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ABSTRACT

This manual is provided to help Wisconsin counties that participate in state-funded public library systems fulfill their statutory obligations to provide library service to their residents. It suggests a range of alternatives, provides a broad outline of planning considerations, and describes service environments and possible responses to those settings. Topics include: the benefits of planning and statutory responsibilities; initiating the planning process; assessing countywide library service needs; translating the data into a plan; and getting the plan adopted. Four appendices offer instructions on surveying for nonresident borrowing patterns, a list of county planning organizations and resources, 1993 county level service data, and a library resource inventory form. (DGM/BEW)

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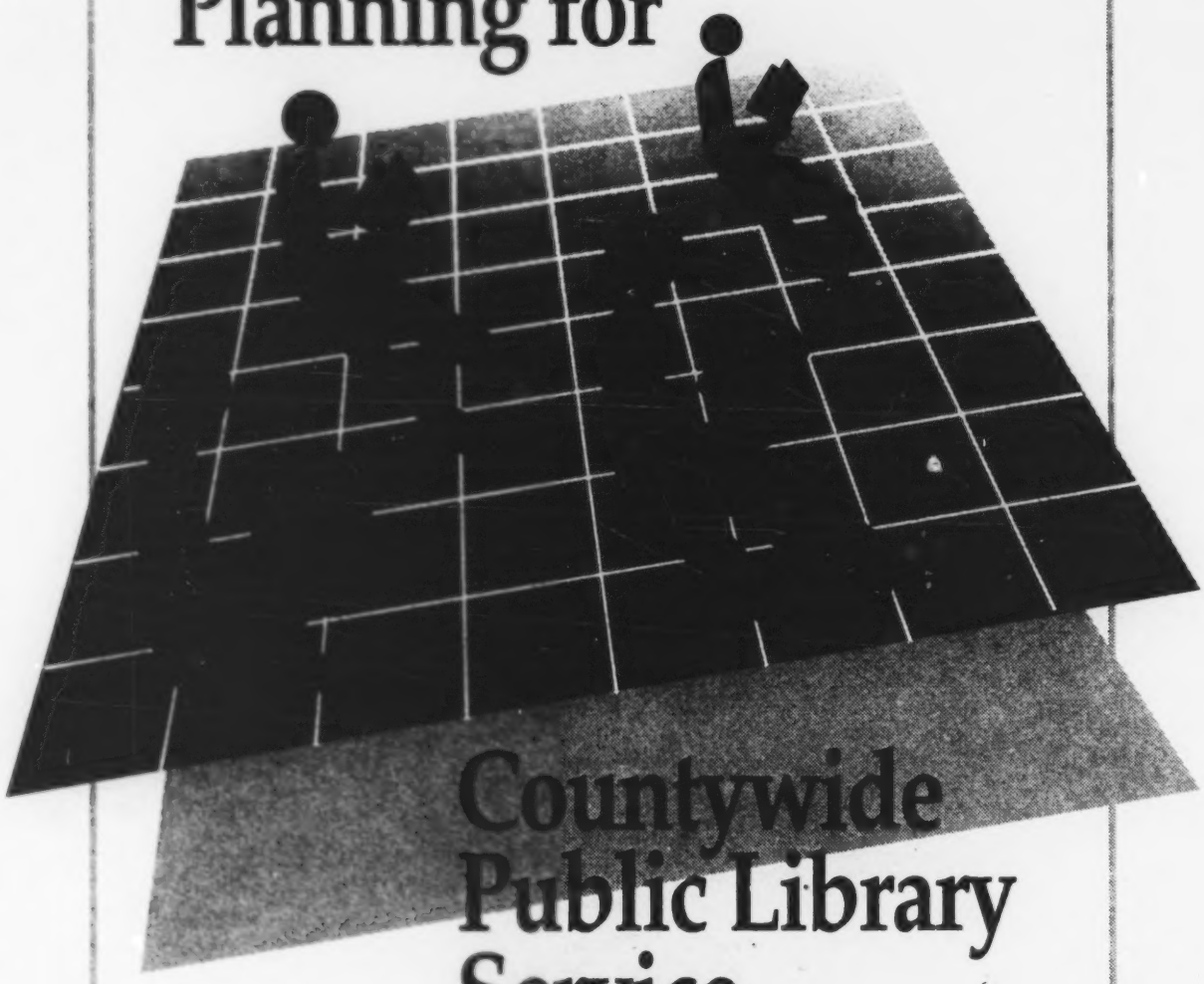
Planning for Countywide Public Library Service



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Planning for Countywide Public Library Service

Anders C. Dahlgren
Consultant
Public Library Construction and Planning

Wisconsin Department of Public Instruction
John T. Benson, State Superintendent
Madison, Wisconsin

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Wisconsin Department of Public Instruction
125 South Webster Street
P.O. Box 7841
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Michael J. Gelhausen
Hartford Public Library

Gloria Hoegh
Winnefox Library System

Kathleen Teitz Norden
Hudson Public Library

Patricia Pawl
Beaver Dam Community Library

David Weinhold
Eastern Shores Library System

Jym Wroblewski
Southwest Wisconsin Library System

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1 *Introduction*

Planning is an essential ingredient in the development and improvement of today's libraries. For more than a decade, libraries have been encouraged to examine the communities they serve, to identify the needs of those individual communities, and to develop a strategy—a plan—for providing services that will meet those needs. Tools such as PLA's *Planning and Role Setting for Public Libraries* (McClure, et. al., 1987) can assist libraries and governing agencies with assessing local needs and creating a plan for service. *Wisconsin Public Library Standards* (DPI, 1994) makes broad recommendations regarding service goals for libraries across the state, but also strongly encourages individual libraries to examine their particular local needs and develop a plan to meet those needs.

The emphasis placed on planning recognizes the unique situations and challenges faced by each individual library. Similarities may exist among libraries in a certain geographic area or among libraries serving a certain population range, but these shared characteristics are not an unfailing guarantee that any two libraries' service needs will be comparable. The most meaningful program of service is one that results from an examination of the particular library needs of a specific community.

The emphasis placed on planning library services also recognizes the fact that libraries of all types operate and evolve in a political environment. The needs assessment process can help the library understand better the elements in that environment. And a better understanding of the library's political setting will help the library advance its cause.

These premises and considerations regarding the value of planning for the individual library (public, school, academic, or special) levels as well. Under Wisconsin statute, counties that elect to participate in a library system are responsible for delivering library services to those county residents living outside of municipalities that maintain and support a public library directly. Each county must develop a plan for delivering library services to those residents. Principles of sound planning apply to the county planning setting just as they do in other library settings.

Just as the library service needs of individual municipalities vary across the state, so do those of individual counties. Just as the capabilities to support library services vary from municipality to municipality, so do the capabilities vary from county to county. Just as the public demand for service at a particular level varies among municipalities, so does the public demand vary among counties.

This manual is provided to help counties that participate in state-funded public library systems fulfill their statutory obligations to provide library service to their residents. It is not intended to describe the minimal level of services that are recommended for every county. It is not intended to provide the single answer to what is good, or effective, library service at the county level. There are too many variations on the theme of effective library service to provide a single, "cookie-cutter" approach to county-level planning.

Instead, it is intended to suggest a range of alternatives for consideration. It provides a broad outline of planning considerations and describes service environments and possible responses to those settings. By building on basic sources in the library planning literature, this manual offers a model process for assessment of library service needs at the county level and for development and implementation of a plan for countywide library development and improvement.

References

McClure, Charles R., et al. *Planning and Role-Setting for Public Libraries: A Manual of Options and Procedures.* Chicago: American Library Association, 1987.

Wisconsin Public Library Standards. Madison, WI: Department of Public Instruction, 1994.

2 *Why Plan?*

In some circles, planning is seen at best as a necessary evil; in some others, it is seen as an unnecessary evil. In any case, there is a variety of reasons why libraries and counties should develop a plan for improving library service.

Benefits of Planning

Planning has been defined as "a series of successive approximations to a moving target" (Robbins-Carter, 1985). It is an attempt to identify the library service needs of a particular clientele or community and to develop an agenda of actions to address or meet those needs. PLA's *Planning Process* (McClure, et. al., 1987) defines seven steps in a cyclical process:

- **Planning to plan.** The library organizes for the work ahead.
- **Looking around.** The library collects information about the library and the community it serves.
- **Developing roles and mission.** The library selects roles and defines a mission.
- **Writing goals and objectives.** The library translates its role choices and mission into statements of desired ends or targets.
- **Taking action.** The library produces tangible evidence of the library's planning.
- **Writing the planning document.** The library reports the results of planning activities.
- **Review and recycling.** The library evaluates accomplishments and recommends future actions.

The seventh step in the process leads back into the initiation of a new cycle of planning by "planning to plan" once again.

The process of conscientious planning leads to a better understanding of the service community (in this case, the county), the resources presently available, the resources needed or wanted by residents, and the avenues available for providing those resources and services. A better understanding can be turned to the libraries' advantage.

A familiar saying holds that "if you don't know where you're going, any road will get you there." A careful examination of local and countywide library service needs and the understanding of the service environment gained through planning can provide directions for the county's efforts to deliver library service. The assessment of needs can identify areas for improvement that in turn can be used to allocate the county's resources.

A variation on this planning theme likens planning to "sharpening the ax." A planning process that gives government officials thorough, accessible knowledge of the county's library service priorities enhances the ability of these same officials to make informed decisions during budget reallocations or cuts. Decisions can then be made with a true understanding of the consequences of funding priorities. A planning process in and of itself should not be considered a prelude to budget cuts, but in these times of unstable, even erratic, funding, informed decision makers can be more helpful than the uninformed. The planning process gives libraries and decision makers the tools to make sound choices for their community's library.

The planning process can be used to spotlight and resolve major service and funding inequities for public libraries in the state. On average, Wisconsin public libraries hold 3.25 volumes per capita (in 1993), but among the 380 individual public libraries in the state the number of volumes held per capita ranges from roughly one volume per capita to more than 45 volumes per capita. Fully 20 percent of the

public libraries in the state are open 20 or fewer hours per week. On average, municipal per capita support for libraries outstrips county nonresident per capita support by roughly three to one. A planning process is a practical means for addressing these and similar issues.

Planning offers an opportunity to educate members of the public as well as members of the governing authority, the county board. It can be used as a public relations vehicle. The planning process provides a chance to involve a wider range of citizens and officials in library governance, in the establishment of goals and service targets for countywide library development. Through that involvement there is a dual opportunity:

- to inform these individuals about the library resources available in the county and the county's role in contributing to library service, and

- to encourage their continued and further support for local and countywide library development.

This process of informing and educating decision makers in the county can strengthen the relationship between the county officials and library supporters. Library advocates can become more informed and more effective leaders for the improvement of library service. Librarians and trustees can become more cognizant of the political process and assert themselves in that process more effectively. As planning results in a better overall understanding of library services provided in the county, service enhancements and improved, more equitable funding for library service can be secured.

Unless you know what the county's library service needs are, unless you can learn what inequities exist (if any) regarding funding for library service, unless you can show evidence of new services that can and should be introduced or existing services that should be eliminated or modified, the delivery of library service countywide will be haphazard, sporadic, and uncoordinated.

Statutory Responsibilities for Planning

Apart from these benefits inherent in the planning process, Wisconsin law requires various types of planning at the local, county, and system levels.

Individual local libraries are the foundation for public library service in Wisconsin. Chapter 43 of the Wisconsin Statutes describes the means whereby a municipality may establish and maintain a public library. Each local library board is responsible for developing and implementing the library's plan for serving its residents. Library service to residents who live outside of municipalities that have established a public library is the responsibility of the seventy-two counties. Counties that participate in a public library system are required to develop a plan to provide library service to its residents. The seventeen public library systems also provide a context for exploring library service needs and developing strategies to deliver service. One of the major responsibilities of systems is to foster library development and inter-library cooperation on a county and regional level. The Division for Libraries and Community Learning provides overall coordination of and support for all of these planning efforts. The county's library planning effort should be coordinated with system plans and local plans for library development.

The County's Responsibilities

Under Wisconsin law (*Wis. Stats.*, s.43.15(4)(b)), a county may participate in a federated library system if it:

> (1) Adopts and maintains [a] plan of library service....
> (2) Provides the financial support for library services required under sub (1).
> (3) Enters into a written agreement with the public library system board to participate in the system and its activities and to furnish library services to residents of those municipalities in the county not maintaining a public library.

Because every county in the state participates in a library system, every county in the state has assumed the responsibility for furnishing library service to residents who live outside of municipalities in the county with an established library, and every county has assumed the responsibility for adopting, maintaining and funding a plan of library service.

The procedure for adopting the original county plan is described in *Wis. Stats.*, s.43.11. A county board is authorized to appoint a planning committee, notifying the Division for Libraries and Community Learning when it does so. The composition of the committee and the term of membership is stipulated.

The committee is assigned the following duties (*Wis. Stats.*, s.43.11(3)):

> (a) The committee shall investigate the potential of a public library system in the county and adjacent counties, and prepare a plan for the organization of a county or multicounty system. It shall conduct public hearings for which representatives of all libraries in the county shall be invited and shall cooperate with similar committees of adjoining counties for the purpose of planning multicounty public library systems.
> (b) The committee's final report, including a plan for initial and long-range services and copies of any written agreements necessary to implement the proposed system, shall be filed with the county board and submitted to the division. Plans for multicounty systems shall include a method for allocating system board membership among the member counties.
> (c) The plan for library service for a county, whether for a single county or a multi-county system, shall provide for library services to residents of those municipalities in the county not maintaining a public library under this chapter. The services shall include full access to public libraries in the county participating in the public library system and libraries or other services deemed appropriate by the committee. Services may be provided by contracting with existing public libraries in the county or in adjacent counties or with the public library system or by creating a county library organization under this chapter. The plan of library service for a county may provide for improving library service countywide and in municipalities that have libraries. The plan shall specify the method and level of funding to be provided by the county to implement the services described in the plan and shall describe the services to be provided by the public library system and the allocation of state and county aid to fund those services.

While the requirements for formulating the *initial* county plan is the thrust of *Wis. Stats.*, s.43.11(3), the county has continuing obligations to support library services by virtue of the provision to "adopt *and maintain*" a plan, according to *Wis. Stats.*, s.43.15(4)(b)(1).

The System's Responsibilities

Each system likewise is required to develop various plans to meet mandated system services. The system's annual reporting requirements to the Division for Libraries and Community Learning include a projection of plans for the coming year (*Wis. Stats.*, s.43.17(5)):

> (5) ANNUAL REPORT. Annually, at the time required by the division, each public library system shall report to the division on its operations, expenditures and territory served during the preceding year, shall submit a plan describing the program for library service to be carried out in the subsequent year and shall furnish such other information as the division requires.

Much of that planning activity centers on the mandated system services found in *Wis. Stats.*, s.43.24(2)(a)-(n). Several of those mandates specifically direct that a plan be developed in response to local needs. For example, the system service mandate regarding in-service training is to be documented by "a plan and service program" (*Wis. Stats.*, s.43.24(2)(e)). Much of a system's planning activities are centered around developing a single, broadly based system plan of service that addresses these mandated service requirements as well as any additional services deemed appropriate for the system's service

area. A county plan should acknowledge the context provided by this system-level plan and work in concert with it.

By way of supporting county planning efforts, systems are required to provide consulting services to public libraries and to participating counties. A local or county planning committee can receive direction, advice, and support from the system with regard to any of the planning issues discussed in this guide.

The system mandates also require a system to monitor all of its participating members and to certify that they are all in compliance with the requirements for participation in the system. This includes the requirement that counties "adopt and maintain" a plan for service (*Wis. Stats.*, s.43.15(4)(b)(1)).

The Municipality's Responsibilities

Wisconsin law empowers a community "to establish, equip, and maintain a public library" (*Wis. Stats.*, s.43.52(1)). A municipality is not required by statute to engage in routine long-range planning to determine an appropriate level of library services to meet its community's needs.

While there is no explicit direction that a municipality must develop a plan before establishing and maintaining a new public library, statute does require that the municipality "obtain a written opinion by the Division regarding the feasibility and desirability of establishing the public library before final action is taken" (*Wis. Stats.*, s.43.52(1)). The information the Division would require before being able to render an informed opinion is comparable to what would ordinarily be included in a long-range plan for library service. In this way, the municipality's responsibilities are similar to those of the county regarding the establishment of library service—both need to develop plans of service, which the Division then reviews and approves. A major distinction between these plans for establishment of a new library or county library is that the Division's review and opinion on the *municipality's* action is advisory and is not binding.

Implied or explicit statutory responsibilities aside, each municipal library has a continuing obligation to participate fully in county library planning efforts and system service planning efforts, in order to ensure that those efforts are well-coordinated and fully informed. The Division also provides continuing encouragement for those municipal libraries that choose to engage in locally based long-range planning: *Wisconsin Public Library Standards* recommends that "the library board and staff develop and write a long-range plan that covers the next three to five years" and suggests some basic components for such a plan (DPI, 1994).

The Division's Responsibilities

Under *Wis. Stats.*, s.43.13, the Division for Libraries and Community Learning is required to review final reports submitted by county library planning committees regarding the establishment or extension of a library system. Before approving the establishment of a system, the Division considers "in addition to the standards set forth in *Wis. Stats.*, s.43.15, the proposed system territory, organization and financing, initial and long-range plans for library services, the role of existing multi-jurisdictional service programs in the territory and plans for cooperation with adjoining systems and with other kinds of libraries in the territory" (*Wis. Stats.*, s.43.13(1)(a)).

When the initial system plan and its supporting county library plans meet with the Division's approval, the Division is required to notify the appropriate county boards and county library planning committees.

As with the detail of the county's responsibilities, this list of the Division's statutory responsibilities regarding county planning is geared more toward review of the initial county plan. The Division for Libraries and Community Learning, however, is required to "review the reports and proposed service plans submitted by the public library systems under *Wis. Stats.*, s.43.17(5) for conformity with [statutory requirements] and such rules and standards as are applicable" (*Wis. Stats.*, s.43.24(3)). This includes a review of the system's certification of compliance on behalf of member counties that the counties in the system have developed and maintain a plan of service.

Moreover, the Division strongly encourages sound planning as a means of promoting good public library service. Encouragement is provided through publications such as the *Wisconsin Public Library Standards*, consultant assistance, continuing education activities, and periodic allocations of Library Services and Construction Act (LSCA) funding to support local and county planning efforts.

The Broader Planning Environment

Local and county level planning is promoted in the context of a variety of other planning efforts. Ideally, county planning efforts should be coordinated within this sometimes complex environment.

A county plan for library service should consider any existing plans developed by the municipal libraries in the county. Those plans can help identify service needs that can or should be met with county assistance. Likewise, the county plan should be cognizant of the overall goals and service targets that apply to the system's general plan and to the system's "special" plans (automation, special needs, collection development, and multi-type services). A county plan should be complementary to these other local and regional assessments of service need.

A county plan for library service should also take into consideration the recommendations for public library service expressed in *Wisconsin Public Library Standards*. Insofar as individual local libraries may attempt to meet them, the service goals expressed in the standards can serve as an important baseline for identifying countywide library service goals.

Nationally, PLA's *Planning and Role-Setting for Public Libraries* (McClure, et. al., 1987) serves as a model process for planning library services at any level. PLA also sponsors the Public Library Data Service, which serves as a valuable resource for comparative data on library service and use. Another such resource is being produced through the combined efforts of the U.S. Department of Education, ALA's Association for Specialized and Cooperative Library Agencies, and the Chief Officers of State Library Agencies as they coordinate state-level gathering of library statistics in an attempt to make that data more uniform.

Assessing the library service needs of a municipality's or a county's service area and developing a strategy for meeting those needs has become the heart of library planning. The planning environment for most counties is multi-layered and complex and rich. A carefully crafted plan of service will help each county chart an effective path.

References

McClure, Charles R., et al. *Planning and Role-Setting for Public Libraries: A Manual of Options and Procedures.* Chicago: ALA, 1987.

Robbins-Carter, Jane and Douglas L. Zweizig. "Are We *There* Yet? Evaluating Library Collections, Reference Services, Programs, and Personnel." *American Libraries* 16.9, October, 1985.

Wisconsin Public Library Standards. Madison, WI: Department of Public Instruction, 1994.

3 *Initiating the Planning Process*

It is not always necessary to undertake elaborate planning activities. PLA's *Planning and Role-Setting for Public Libraries* suggests that varying levels of effort can be applied to different steps in the planning process, according to the time and resources available at the time of the planning study. The concept of devoting varying levels of effort to different steps in the planning process can be applied to county-level planning as well. Still, most successful county planning efforts will typically visit many similar themes and issues.

One of the most common obstacles to effective planning is inertia. Simply getting the process started can require substantial effort. This section summarizes issues to consider when initiating planning. Individuals who seek to encourage county-level planning—local librarians and library trustees, library patrons, county board members, among others—need to think about who appoints a county library planning committee and how; what the charge to that committee will be; what the expected outcomes of the planning process are; when the planning process needs to be completed; and what costs the process will likely entail.

As the planning process is being organized, it is absolutely essential that supporters keep in mind the ultimate audience for the plan: the county board of supervisors. A county library plan may have other purposes and other audiences, but the clear, primary purpose is to promote library development throughout the county by securing adequate support for library service through the county board of supervisors.

Start the Planning Process

Any of several parties may assume responsibility for initiating the county library planning process. The perspective brought to the process may vary as a result of who started the process. Usually, planning activities are most productive when initiated by those who will be involved with implementing and benefitting from the plan. Library directors or public library trustees from municipalities in the county may open discussions by approaching the county board or the county library board with a request to examine library needs and services throughout the county.

Others may seek to initiate a county planning process as well—many of the state's initial county planning efforts were begun by residents from outlying county areas who sought improved access to library services for themselves.

In some cases, library system staff or system board members may be able to suggest that the county undertake a county wide library needs assessment; other times, however, a county board may view a suggestion by any outside agency as an intrusion on their responsibilities. County boards are understandably more responsive to requests from constituents.

A county board could decide on its own to evaluate its role in providing library services. Maybe the board is prodded by a looming fiscal crisis, or maybe the board is motivated by some broader effort by the National Association of Counties to encourage members to examine their overall program of service, but the impetus could come from within.

To a large extent, however, the responsibility for starting the process will be conditioned by the current structure for providing library service within the county.

- If library services are provided through a consolidated county library, the planning process will proceed as it customarily would for any other individual public library. The consolidated county library board may initiate the process by appointing a planning committee.

- If the county is served by a single-county federated library system, the system board will normally take the lead to initiate county planning, often as a direct part of the system's annual planning effort.

- If the county is part of a multi-county federated library system, the initiative is more likely to arise from within the county, probably from individual public libraries approaching the county board to appoint a planning committee. In some cases, the library system may approach the county board on behalf of the individual libraries in the county.

- If a county library board is already in place, this board is likely to initiate the planning effort. The county library board will likely work in concert with the county board of supervisors to assemble the planning committee.

Determine the Objectives of the Planning Process

Every planning effort starts with at least a general understanding of the critical issues. These issues may change and evolve as the planning process proceeds, but the germ is there at the start. The broad goals of the planning effort might be:

- to determine what new services may be needed by residents of the county and how best to provide those services,

- to spread the cost of providing county library service more equitably between city residents and county residents,

- to address and compensate use by county residents of selected libraries in an adjacent county, or

- to reduce the county's funding obligation to meet revenue cuts.

Other goals may be suggested by the local context.

These different purposes suggest different types of expertise that may be needed when assembling the participants of the countywide planning process. If one of the goals is to determine how best to organize a cooperative technical processing operation for the benefit of county libraries, the logical participants to lead that study would be staff from libraries in the county. If the goal is to identify new services, it could make sense to involve a broader spectrum of potential service users as participants. If the goal has to do with a major restructuring of funding (sources or distribution or amounts), it would be wise to include representatives from the affected funding authority(ies).

In any case, the expected outcomes of the planning process should be considered very early in the process if for no other reason than to identify the individuals and skills that will best support and advance the county library planning effort.

Structure the Planning Environment

Typically, plans are developed through the work of an appointed county planning committee, sometimes assisted by a separate librarian's advisory committee. In preparing to undertake a county library planning process, the county board or the planning committee must guarantee appropriate administrative and staff support for the entire process and assign specific responsibilities to participants or individuals for coordinating the planning effort. The committee should consider and establish a timetable and a budget for planning.

Establish a Planning Committee

Most models for planning suggest that a committee be established to develop the plan itself or to counsel the individuals who are charged with developing the plan. Establishing a separate planning committee usually has the advantage of involving more people in examining the county's library needs, thereby introducing a greater divergence of perspective

and, through this broader participation, encouraging wider support of the ultimate plan.

Sometimes an existing committee—the county library board, for example—may elect to serve as a committee of the whole and act as the planning committee. This approach does have the advantage of bringing to the planning table a collection of individuals who are knowledgeable about the structure of library services in the county. There should be little need to take valuable time to familiarize these committee members with the current status of library service in the county. But this approach risks losing the variety of fresh perspectives that enriches the planning process when a separate planning committee is established.

Section 43.11(2)(a) of Wisconsin Statutes outlines the legal requirements for establishing a planning committee to draft the county's initial plan for library service. Among the requirements for the composition of the planning committee as set out in *Wis. Stats.*, s.43.11(2)(a) are:

- there should be no fewer than seven members, and no more than 15 members;

- residences of planning committee members should reflect the distribution of population within the county;

- existing public libraries in the county should have representation; and

- no more than one planning committee member should be appointed from the county board.

These statutory requirements for the composition of a planning committee to develop an initial countywide plan of service can serve as a general guide for future county library planning committees. These requirements, however, are not binding, except for the initial countywide plan for service.

In general, then, the committee should be large enough to provide appropriate representation for institutions and groups that have a stake in the outcome of the planning process yet not so large as to be unwieldy.

The Authority to Appoint a County Planning Committee

Chapter 43 directs that the county board is responsible for appointing the planning committee that developed the original plan for service, and in most cases the county will appoint the committee that revises and updates the plan. Where a county library board already exists, statutes direct that the county board designate the county library board as the planning committee for the initial county plan. The county library board then may choose to appoint a planning subcommittee. In some cases, the county board will appoint a special planning committee. In other cases—most likely in a single-county system—the county may confer the appointment of a planning committee to another agency, like the library system.

In every case, however, the county board of supervisors should be a partner in the appointment of the planning committee. If the county board of supervisors does not appoint the planning committee directly, the appointing agency should apprise the county board of the appointments, and even seek the board's concurrence. If another agency makes the appointments to the county planning committee, the county board should nevertheless be informed of the need for this planning effort, the possible or probable outcomes, and the types of issues for county board review that will likely evolve from the planning effort.

The four primary options for an appointing authority, then, are:

- the county library board if one exists,

- the county board of supervisors,

- the public library system board in a single-county system, or

- the public library system board in a multi-county system where there is no county library board and the planning effort is supported by the major concerned parties.

The appointing authority clearly shapes the powers of the planning committee and provides

direction to the committee, either implicitly or explicitly. A county board may elect to appoint a planning committee that is more sympathetic to the board's perception of the county's fiscal constraints than receptive to the demonstrated library service needs of the county. If appointments to the planning committee are made by the county library board or by the system, library service needs may well take precedence in the committee's work. Pay attention to the agendas—both overt and hidden—of the appointing authority. Seek an appropriate balance in the composition of the county library planning committee.

Sources of Appointments to the Planning Committee

The ideal membership of any county library planning committee will be guided by the goals established for the planning process. Appointments to the planning committee can come from a variety of sources, each with a valuable perspective, each with its advantages, each with its potential disadvantages.

Most appointing agencies strive to balance the appointments to a planning committee in a number of ways. Geographical representation is often sought, as is representation from libraries of varying sizes (especially if there is a wide spread in the population of communities within the county). Appointments may seek to balance library users and nonusers, librarians library trustees and other government officials, and so on. Appointments are frequently drawn from the following groups:

- **Directors and staff from member libraries** can contribute a first-hand knowledge of the services and resources and needs of their respective libraries. They should also be well aware of the needs and resources available in neighboring libraries, as well as the needs of the broader service community in the surrounding area.

- **Member library trustees** can combine a familiarity with their own library's services with a perspective that represents the views of the populace at large. A trustee's status as a lay person can suggest (rightly or not) a more impartial perspective than that offered by local library staff members. Likewise trustees from the board of the public library system serving the county can bring these perspectives to the planning committee.

- **Library users** can be an important part of the planning mix, especially if the planning effort seeks to evaluate existing services or identify additional services to provide.

- **Individuals who are not library users** can provide yet another viewpoint. They may be able to contribute ideas for promoting and encouraging existing services more effectively, or suggest alternate services that would better meet the needs of this population. Nonusers support the cost of library service every bit as much as users do, and participation by nonusers can foster a better understanding of the county's role in providing library service that can translate into greater support (or at least a benign lack of concerted opposition).

- **County officials** are often a key element in this planning environment. Involvement of county officials can be essential especially regarding funding issues. The more county board members and other officials can be involved in the planning process, the better informed they will be and the more likely they will be to support the cause of county-wide library service.

- **System board members** appointed from the county can be effective additions to a county planning committee. By representing county and the system board, these individuals can serve as liaison between the planning committee and other important constituencies.

- **Representatives from adjacent governing units or libraries** may be appropriate appointments in certain specific situations. For example, planning studies that seek to explore library use across county or system borders may benefit from such participation. Some county boards, however, may be reluctant to appoint "outsiders" to a county committee. The effectiveness of such appointments

will depend on the issues to be addressed through planning, the type of information that may be needed or useful for the formulation of goals and objectives, and the expected outcomes of the planning effort.

• **System staff** can play an important supporting role. While a formal appointment to the county planning committee may not be necessary or even appropriate (one can recall the reluctance of some counties to appoint "outsiders"), the participation of the library system director or a member of the system's consultant staff can provide a valuable perspective, bringing to the table knowledge of other services that are provided in other parts of the region or state, or alternate funding mechanisms for county support.

• **Staff from the Division for Libraries and Community Learning** can provide assistance throughout the county planning process. Don't overlook the resources and expertise and support that are available through the systems and the Division.

In some cases, other outside resources are needed. Particularly sensitive issues may require the services of a disinterested third party hired to conduct the study or broker the dispute. Such issues may include an inequity of county versus municipal funding, perhaps, or an acute imbalance of reciprocal use among county libraries or between municipal and outlying county use. System staff may be able to provide the necessary objectivity. Alternately, an outside consultant may be retained as part of the planning effort to identify data gathering needs, gather data, conduct investigations into countywide needs, facilitate meetings, or other tasks among a wide variety of options.

In considering the various individuals and constituencies that may be invited to participate on a planning committee, the size of the committee is of concern. As mentioned earlier, *Wis. Stats.*, 43.11(2) directs that the committee should be no fewer than 7 and no more than 15 members. Too small a committee may not be representative of the service community (if broad and fair representation is one of the goals of your process). Too large a committee becomes unwieldy, difficult to manage, prone to digressions and a loss of attention and interest if products of the committee's efforts are not soon forthcoming. Regarding the number of appointments to the planning committee, there is no hard and fast guideline that will insure the success of the committee. This reflects the approach taken by most planning efforts, striking what is usually a reasonable balance between representation and manageability.

Establish a Librarian's Advisory Committee

As a complement to the formal planning committee, a librarian's advisory committee should be designated. The composition of such a committee can vary, depending on the needs of the particular situation. It may include the library directors from every library in the county. Alternately, it may include just those library directors who do not already have an appointment to the formal planning committee. Library staff from different levels and different libraries—the director from one county library, a department head from another, clerical staff from a third, or circulation staff from one library, children's staff from another may also serve.

The advantages of convening a librarian's advisory committee are many:

• It expands the circle of participation to include still more individuals representing more organizations (crucial to the production *and promotion* of the plan).

• It provides another level of technical expertise and support to the planning committee, reflecting more thoroughly the day-to-day library service demands faced by the libraries in the county.

• It fosters a greater understanding of the goals and intent of the plan among those who will ultimately be responsible for implementing the plan.

Assign Responsibility for Coordinating the Planning Effort

Every planning effort needs one individual or agency that assumes the responsibility for completing the project. The chair of the formal planning committee will carry some—maybe even a large share—of this responsibility. More likely, the chair of the planning committee will be assisted by support staff from one or more of the participating agencies. The individual who can take the lead in providing this essential support will be determined according to a number of questions, such as:

- What agency (or agencies) will provide staff support for the planning effort?

- Who will schedule the meetings and distribute notices of upcoming meetings?

- Who will make the arrangements for the meetings of the planning committee?

- Who will record, copy, and distribute the minutes?

- Will this support come from volunteers from the existing libraries?

- Is the system able to help with this coordination?

Perhaps most important is the question: who will prepare the final report? The responsibility for sitting at the keyboard and drafting a summary of the committee's findings and recommendations should be clearly assigned as early in the process as possible. Depending on the preferences and organization of the county library planning effort, the report may be prepared by a planning committee member, a county staff member, a volunteer from a member library (either a staff member or a trustee), system staff, or a paid consultant. Typically, there should be one individual—or, at most, a very small subcommittee—charged with the responsibility of actually drafting the report.

Establish a Schedule for the Study

Part of the pre-planning effort will be to establish a timetable for the committee's work. This schedule should take into account the scope of the study, the size and complexity of the planning committee, and other deadlines and target dates that may be imposed by outside agencies. The timetable may be affected by these factors, among others:

- **Scope of the revisions.** Do planners anticipate a major reconsideration of the county's library service goals, or is a minor, mid-course correction more likely? The more modest the goals of a planning effort, the shorter the timetable may be.

- **Freqency of meetings.** How often will the planning committee need to meet, and what will be involved with bringing the committee together? A larger planning committee typically involves more preparatory work before each meeting, and it could be advantageous to schedule fewer meetings with somewhat longer agendas with a large committee.

- **Anticipated meeting outcomes.** What will be the major goals or outcomes of each meeting? If committee meetings are too frequent or if they become unproductive, committee members can lose interest in the process. The time and energies of all participants in the county's planning process are valuable; ineffectual, exasperating meetings can squander that important resource.

- **Coordination with other timelines.** What other timelines should the county library study accommodate? Should these efforts tie in with fiscal calendars? If fiscal notes are likely to be attached to recommendations of the committee, it may be advantageous for the committee to complete its work in time to add those recommendations to the county's annual budget deliberations. Or, if the recommendations are likely to be controversial, it may be advantageous to separate this discussion from the heat of the budget process.

Budget for Planning

Unless the *entire* planning effort is to be undertaken as a volunteer effort, some funding will be necessary to cover the costs of the planning process. Who is going to pay for this planning effort? Typically the county will be responsible for related expenses, although these costs may be defrayed in whole or in part by other sources. Library Services and Construction Act (LSCA) grants may be available. In some cases, some measure of support may be available from the system.

Consider the need to budget for any or all of the following:

- **Direct committee expense.** Travel costs for planning committee members, per diems, and other miscellaneous expenses should be provided in accordance with applicable county guidelines for expenditures and reimbursements. Don't overlook the cost of general supplies—paper, postage, etc.—used in support of the committee's activities.

- **Consultant assistance.** If a consultant is engaged to facilitate the planning process, how much is this likely to cost? What can the county afford?

- **Data gathering.** Any *original* data assembled on behalf of the planning committee will often involve some expenditure. Sometimes a survey will be suggested as a way of gauging public opinion on library services. Is a telephone survey contemplated? A mail survey? Another alternative means of gathering this information would be a series of focus group interviews. All of these methods involve certain costs, from postage and phone charges to assistance with the preparation of the survey instrument.

- **Publication costs.** How will the final report of the committee be distributed? What format will it take? Will there be a full and complete report for the county board with a separate, abbreviated summary report? Will the production be simple or elaborate?

4 *Assessing Countywide Library Service Needs*

Needs assessment is the first formal step in the planning effort that should be addressed by the planning committee. It is a time of taking stock, examining current conditions, and exploring the factors that are likely to affect future library service needs. The needs assessment phase provides an overview of the planning environment. It establishes a common source of background information for members of the planning committee.

The needs assessment may be completed by individual committee members, by assigned staff supporting the planning effort, or by a combination of committee members and staff. Decisions made during the pre-planning phase described in the previous chapter will determine who assembles all this information that describes the planning environment, as well as the level of direct involvement by planning committee members and others.

The needs assessment phase can examine information from a variety of sources: the current plan for county library services, existing data (demographic, economic, and library use data), tours, and original data gathered for the study at hand, to name a few.

It is becoming increasingly useful—and necessary—for a county library planning committee to gather information on circulation patterns among the public libraries in the county. Appendix A supplements this section's brief discussion on gathering information on resident and nonresident use of libraries in the county. If this data is not already gathered routinely, county library planners should weigh carefully whether to implement procedures described in appendix A among the county libraries, either on a continuing basis or as a special project. If this data is already part of the data gathering routines for county libraries, county library planners should explore whether local practices conform to those recommended in appendix A.

Status of the Current Plan

The current plan for countywide library services is a good place for committee members to start. If that plan is at all thorough, it should provide helpful background material on how library services in the county have evolved. The status of that plan can be examined in the context of the following questions:

- When was the plan adopted, and is it reasonably current? Many of the existing plans for county library service are older documents. The older the plan, the less likely it is to apply to current library needs.

- Have some goals been accomplished, and can they now be retired? Under the current plan, for example, libraries in the county may have set a goal to establish uniform borrower registration practices, and that project may now be completed.

- Are there any issues addressed in the plan that are simply no longer of great importance? Coordinated acquisition of LPs or the development of a rotating 16mm film collection may be examples.

- Did the plan leave unresolved any large or small issues? If so, time may have rendered those issues unimportant. Or they may still be nettlesome.

- Is new data available that can better define the planning environment? The original plan may assumed a certain balance between resident and nonresident use among county libraries, that a documented track record of several years' use may now dispel.

• Are there new issues that have emerged since the last plan was adopted? As libraries have gained more and more experience in cooperative activities through system participation, sometimes new and unanticipated opportunities for cooperative ventures emerge. Other times technology may offer a new means of implementing some existing service (fax machines, for example, have quickly altered the options a group of libraries has for accomplishing inter-library deliveries).

Review Existing Data

There is a wealth of information currently available that can be used to characterize most planning environments. Descriptive statistics available from the U.S. Census, the county, and the library, among other agencies, can help identify demographic and economic patterns, as well as trends in library use. While existing data can be used to portray past trends or current norms, it can also be examined with an eye toward unusual distributions, or unusual results. These can serve as guideposts to explore reasons for unusual findings.

Demographic Data

Demographic data is the most elemental source of information that describes the service population found in the county. Decennial and special census data form the basis for this information. Countywide summaries of basic demographic data provide a useful sketch of the service population: distribution of the overall, countywide population by age, by gender, by race or ethnic background, by educational attainment, and income.

It can be useful to examine the general distribution of the population within the county. Where are the population centers in the county? Are demographic cohorts distributed through the county in proportion with the overall population or are certain cohorts found in disproportionate numbers in certain parts of the county? For example, is there a disproportionate number of seniors or grade school children in one part of the county or another? If so, does that bear any implications for the structure of library services in the county?

Any demographic description of a county can be interpreted and understood better in the context of comparisons with other counties. The median age of county residents, taken alone, does not necessarily inform the planning committee of much. But the median age of county residents compared with the median age statewide will suggest whether the residents of the county are generally older or younger than peers statewide, and that added context can confer greater meaning on the data.

Comparisons may be made effectively with statewide data, nationwide data, or with some other subset of data. Comparisons with the other counties in the same system may be revealing. Or the county itself may have identified a specific set of "peer" counties statewide or nationwide that it routinely measures itself against, and these counties may be used as a point of comparison.

Another valuable context for demographic data is to track trends over time. The median age of county residents as of the 1990 census is a useful statistic, but it is more informative if in comparison with the county's median age from the 1960, 1970, and 1980 censuses a pattern of increases or decreases can be demonstrated. It is even more informative if a comparison of the county's median age over time with the state's median age over time shows that the county is aging faster (or slower) than the state as a whole, or maybe that the county's median age has decreased while the state's median age has increased.

One product of a demographic analysis can be the extension of identified trends into the future. Projections of future population shifts, though often less than 100 percent accurate, become an important part of trying to forecast library service needs in the county.

A variety of sources can be tapped for demographic information. The county itself is one important source. Individual municipalities in the county are another. The state is covered by ten regional planning commissions that are established in part to provide assistance with gathering this type of information. Addresses for the regional planning commissions are provided in appendix B.

At the University of Wisconsin—Madison, the Applied Population Laboratory assembles current demographic information for Wisconsin and tracks statewide and national trends. The Applied Population Lab is one of Wisconsin's best sources of information about census data (availability, revisions, etc.). In the Department of Administration, the Demographic Services Center in the Division of Energy & Intergovernmental Relations gathers general demographic data on Wisconsin communities. Addresses for these two resources are also provided in Appendix B.

Local school districts are another useful source for demographic information, because they must track population trends carefully in order to forecast needs for classroom space and faculty size.

CENDATA is an on-line service containing statistical data from censuses and surveys from the Bureau of Census, with daily updates. Standard demographic data is available, including population, business and industry, construction and housing.

Commercial sources of historical demographic data and future projections are available as well. Donnelly Demographics is one such company that provides demographic data to libraries and other agencies. Note that there is often a cost for commercially-prepared demographic reports.

Economic Data

Demographic data on the county and its communities is complemented by economic data. Just as the census is a primary source for demographic data, it provides economic data as well. The census gathers economic data on employment, occupation, household income, housing, and more. The Department of Development is another source of economic data for municipalities and counties in Wisconsin. Economic data can be gathered and framed around such questions as:

- **Employment rates.** What is the current or recent rate of employment? How does this compare to employment rates in neighboring counties, in other counties considered to be "peer" counties, to the statewide employment rate, to national employment rates?

- **Occupation analysis.** How are county residents employed? In what sectors of the economy do county residents work? What proportion of employed county residents work in professional and managerial occupations, as teachers, as clerks, manufacturers, laborers, and so on. How do these proportions compare with other counties, with statewide averages, with national averages?

- **Personal income levels.** What is the median household income in the county and in different communities within the county? What is the range of household income throughout the county? What is the pattern of distribution of income? Are there clearly-defined areas where higher or lower household incomes are found?

- **Centers of economic activity.** Where are the centers of economic activity in the county and how are they interconnected? Where do county residents shop and do business? How are economic centers in the county interconnected with centers in adjacent counties? How do these patterns of commercial and retail activity affect transportation patterns in the county? Is there a relationship between levels of commercial or economic activity and levels of library use within the county?

The county itself is another important source of economic data. The county planning committee may find it useful to examine public funding patterns across the county and over time. Other questions that the planning committee may consider include:

- **Revenue patterns.** How is the county generating revenue at present? Has that mechanism changed over the last five years or ten years? Is an increasing share of the county's funding coming from certain revenue sources? or is the distribution of revenue sources essentially constant?

- **Expenditure patterns.** How do expenditure patterns relate to revenue patterns? Have

budgets been balanced or has the county been borrowing to meet current service needs?

• **Tax base projections.** What are the projections for expansion of the county tax base? How rapidly has the county-side tax base increased during the last five to ten years? What new developments—industrial, commercial, residential—are being anticipated as revenue forecasts are made?

• **County support for library service.** What share of county expenditures goes toward library service? What are the trends over time? Has the proportion of funding for library service been increasing or decreasing? If the dollar amounts allocated for library service have been increasing, has the proportion of the total county budget allocated for library service been increasing as well or have the county's total expenditures been increasing faster than expenditures for library purposes?

The regional planning commission serving the county is another source of current economic estimates and projections.

Library Statistics

Current data regarding library use are crucial to developing an understanding of the state of library services in the county. Library use patterns should be assessed in the context of demographic and economic data.

The most important single source of library data for Wisconsin libraries are library annual reports, assembled and summarized each year by the Division for Libraries and Community Learning in the *Wisconsin Library Service Record*.

Every year, every public library in Wisconsin submits an annual report to the Division for Libraries and Community Learning. The annual report solicits information on collection holdings and collection development; circulation and use; revenues and expenditures; and more. The data is summarized and reported in the *Wisconsin Library Service Record*. This publication should become one of the planning committee's key resources. Copies can be obtained from the Division for Libraries and Community Learning.

The *Service Record* data is organized by system, and within each system, by county, so it is very easy to gain an overview of each county's library resources, use, and support. As with demographic and economic data, library use data can be examined with several key issues and questions in mind.

• **Trends and patterns over time.** Are there discernable trends in the *Service Record* data? Is use increasing or decreasing? Are collections held by libraries in the county increasing? decreasing? holding steady? To what extent do libraries in the county rely on interlibrary loan to meet patrons' information needs?

• **Distribution of use among libraries in the county.** Which libraries are subject to the heaviest use? Have borrowing patterns shifted over time? If so, why might these patterns have changed? If county-wide use is increasing, is the increase being felt evenly among all of the libraries in the county or are one or two libraries bearing more of the increase?

• **Distribution of collections among libraries in the county.** Which libraries have what proportion of the total holdings in the county (print, audio and video recordings, periodical subscriptions)? How has the distribution of materials changed over the last five years? the last ten years? If so, what are the possible reasons for the shift?

• **Distribution of fiscal support among libraries in the county.** Which libraries receive the most overall support from their municipality or the most support per capita? Is that distribution proportionate to the distribution of population, or use, or collections?

• **Correlations among circulation, collections, and fiscal support.** Is there a possible connection between a library's proportionate use and its proportionate share of holdings? Does there appear to be a relationship between a library's use and its reported budget?

Service Record data can also be used to draw comparisons and baselines with neighboring or peer counties. The planning committee may explore how libraries in the county compare with libraries in the adjacent counties or with other counties in the system. Comparative data may focus on matters relating to use, library holdings, or fiscal support, among other topics.

Service Record data may be manipulated in ways that aren't presented in the *Service Record* itself.

- Analyze the rate of holdings *per capita* at individual libraries in the county. Such an analysis tends to level comparisons among libraries serving municipalities of differing size (larger communities, after all, tend to support larger collections). Is the rate of holdings per capita similar among libraries in the county? Where are the variations? How great are the variations? Has the rate of holdings per capita for individual libraries increased or decreased over time? Has the county-wide rate of holdings per capita increased or decreased during the last five years? ten years? How does the county-wide rate of holdings per capita compare with adjacent counties or other counties in the system? Note that analyses like these are most effective when the subject libraries' service populations are consistently defined.

- Analyze the rate of circulation *per capita* at individual libraries in the county. Identify trends and changes over time. Compare countywide trends with neighboring counties and other counties in the system.

- Analyze the rate of circulation *per item held* (also known as turnover rate) at individual libraries in the county. Changes over time in the rate of circulation per item held can be compared with trends in neighboring counties and other libraries in the system. Note that a library's turnover rate by itself is just one means of distinguishing the library, that a higher or lower turnover rate isn't inherently good or bad, but that the importance or value given a specific result for turnover rate depends on the service goals of the library.

Other types of comparisons and analyses can be devised using *Service Record* data, according to the information and data needs of the county's planning committee. By no means does the investigation of *Service Record* data need to be limited to the suggestions made here.

Occasionally, it may be informative to gather original library use data—data that might not be reported in the *Service Record*. Circulation data found in the *Service Record*, for example, reports *total* circulation for the library and for the county.

In most cases, the county library planning committee will be encouraged to gather original data that tracks library use by a patron's place of origin. This indicates the proportion of each library's circulation that is generated by local residents, by patrons who may live in a nearby municipality that supports its own library, by patrons who reside in unincorporated, "unserved" areas in the county, and by patrons who reside in other counties. For most county planning committees, this is a key data element; recommended procedures for gathering this information are summarized in appendix A.

Some systems already have member libraries gather this information for internal reporting purposes. If the county library planning committee decides this type of data would be useful, a plan to gather the data should be developed, identifying how the data is to be gathered, when, and by whom. If a special data gathering activity is planned, it should be worked into the overall calendar for the county planning process.

Other types of original data that could be useful in creating a more rounded understanding of the current library setting for the planning committee include library performance measures described in *Output Measures for Public Libraries* (Van House, et. al., 1987). These may include:

- **Author and title fill rate.** This measures the percentage of times a patron finds a particular book or any work by a specific author being sought.

- **Subject fill rate.** This is the percentage of

times a patron finds any book on a specific subject of interest.

- **Reference fill rate.** This measures the librarian's perception of the percentage of times a patron's reference request is satisfied.

- **Document delivery.** This refers to the library's ability to deliver a requested item within seven, 14, or 30 days, either by reserving its own copy or ordering it on interlibrary loan.

Any special data gathering efforts undertaken for output measures should be factored into the planning timetable.

Another valuable source of library use data is the *Public Library Data Service*, published annually by the Public Library Association. This report assembles library use data, holdings data, output measures, demographic data, and fiscal data from hundreds of libraries of all libraries nationwide that voluntarily submit this data to PLA. The value of PLA's *Public Library Data Service* is in providing a different framework from which to examine the data from individual libraries in the county. It should be noted that PLA's report provides data for *individual libraries*. County level data are not reported, unless the participating library happens to be a county library. Be aware that service populations are self-reported and may not always be consistent with local practices. It should also be noted that PLA's publication tends to cover larger libraries more effectively than smaller libraries, although in recent editions, more smaller libraries have reported their data for inclusion.

Library Resource Inventory

The *Service Record* provides a convenient overview of the basic elements of library service in the county. It may be useful to embellish that data and present it in a consistent format as a resource for planning committee members. That is the purpose of a library resource inventory (see sample form in appendix D).

Some variation on a library resource inventory form can be completed for each library in the county. The inventory could include basic data drawn from the *Service Record*—resources added and owned (books, magazines, videocassettes, audiocassettes), circulation, interlibrary loans, patron registration, staffing, income and expenditures, and so on. This data could be supplemented by other information gathered locally, apart from the *Service Record*, including:

- additional statistical detail beyond that found in the *Service Record* (identifying and tracking the split between adult and children's circulation, for instance, or the split between resident and nonresident circulation);

- additional financial detail beyond that found in the *Service Record*;

- a list of special strengths within the library's collections (local history, perhaps, or county genealogy, or nonprint material);

- a summary of special programs and events held at the library;

- a description of the building and any existing space needs or plans for future expansion;

- a listing of the roles selected by the library from PLA's eight representative role profiles; and

- information relating to the library's automation efforts, such as whether the library participates in WISCAT, whether the library uses an automated circulation system, and if it does, who is the vendor and is it shared system or a local stand-alone system, and so on.

Although the major emphasis of the planning effort may be directed toward public libraries and public library service, existing nonpublic libraries in the county—such as school library media centers and academic libraries, area corporate, business, and private libraries, and the like—may have an impact on the plan for library service. An inventory of these libraries may be useful.

Also be aware of library resources that may be available in adjacent counties. It is often necessary to expand the committee's data gathering efforts beyond the county line to consider a broader community.

Library Tours

Another means of fostering an understanding among planning committee members of the library resources available in the county are visits to the libraries. Tours can be an extension of the library resource inventory.

Tours can be scheduled for the library planning committee so they can see first hand what the libraries are able to offer to county residents, how they are organized, and—more importantly—the challenges they face. Tours may be particularly effective when the planning committee is comprised of mostly nonlibrarians, and even more effective when the committee has a strong tie to the county funding agencies.

One useful strategy to encourage planning committee members to visit the various libraries is to schedule the committee's meetings at different libraries through the county. This offers an excellent opportunity to showcase the needs of the host library. The committee may want to schedule a meeting at one of the smaller libraries in the county, even though that library doesn't have a meeting room. It could be instructive for the planning committee to meet in the library while the library is open. Take care, though, that the bustle of library activity isn't too disruptive to the committee's attention. Take care, too, that the host library is given the courtesy of advance notice that it may be used to highlight a certain deficiency in service.

Surveys and Questionnaires

Sometimes additional information about county libraries or their publics would be beneficial for the county planning committee. There may be specific issues that the planning committee wishes to explore that are not addressed in any source of existing data—for example, frequency of use, or the interest in supporting tax increases for certain service enhancements. At some point in the planning process, the idea of conducting a survey often arises. The library resource inventory discussed earlier is a type of survey. Other types of surveys can be used to gather original data about a subject population.

The literature on survey construction is extensive, and there is no need to replicate it here. Planning committee members should be sensitive to the advantages and disadvantages of the following techniques for gathering original data:

- Identify the appropriate target audience for the survey (librarians and staff from member libraries, member library trustees, library users, citizens at large).

- Go beyond the "conventional wisdom" if appropriate; consider "nontraditional" audiences (survey by *family*, for example).

- Consider carefully how to best reach the target audience.

- Provide reasonable assurance that the survey respondents will constitute a representative sample of the target audience (respondents to a mail-in survey who select themselves by choosing to return the survey form they receive may not be representative of the population at large).

- Word questions carefully and clearly, asking only one question at a time.

- Avoid non sequiturs such as "Do you carry your lunch, or do you walk to work?".

- Know how you're going to use the responses to a question before you ask the question.

- Pretest, pretest, and pretest again, giving your survey a limited trial run to assess whether respondents can correctly interpret and understand the questions.

- Determine the response rate that will pro-

duce the desired level of validity (a low response rate can limit the ability to draw inferences about the population at large).

Typically, the more effective, the more reliable, the more valid a survey is, the more it will cost to construct and implement.

The Library Evaluation and Development (LEAD) Center at the University of Wisconsin School of Library and Information Studies can assist local libraries and county planning committees with the development of data gathering instruments. Appendix B provides addresses for agencies that can provide assistance to local planners.

Private marketing and consulting groups located throughout the state can provide this assistance. Many of the state university campuses provide faculty or resources that can help with survey development and application.

Nonresident Use Surveys

Many county library plans involve compensating local public libraries for services provided to county residents, paid on a per use or per circulation basis. In counties where this is the underlying rationale for the distribution of county funding, it is necessary to estimate the proportion of library use within a county generated by residents of municipalities that support a public library, by other residents of the county, and by residents of other counties. It is often necessary to estimate how much library use is generated by residents of other, adjacent counties as well.

Efforts to gather information on these use patterns typically need to be coordinated on a countywide basis and are even more effective if they can be coordinated on a systemwide or regional basis. Appendix A provides a detailed discussion of planning considerations for gathering data regarding countywide library use patterns.

Among the issues to consider are:

- How narrowly or closely does nonresident use need to be classified in order to provide necessary information in support of the county plan?

- Can the needed data be gathered through an automated library system, or does it need to be assembled by hand?

- Can uniform definitions be determined for such things as public library use, circulation, library taxing unit, residency of a nonresident user?

- Can simple, easily defined and readily implemented data gathering procedures be developed? What information needs to be recorded? How can it be tallied without interfering in day-to-day operations?

- Will the libraries need to gather data year-round, or can a sample period be employed?

- Who will compile, edit and audit the results of the data gathering effort?

- How will the results be incorporated into the decisions made in support of the county plan?

Other Tools for Assessing Needs

Many times, the activity occurring in the most familiar library environments determines the range of possibilities for the planning committee. Committee members often know the services and resources that are available at the libraries within the county, and it is easy to understand that their familiarity with local services and needs can suggest that there are no other options.

Sometimes it can be instructive to extend the committee's range to include patterns of library service and support in adjacent counties. A review of current activities and any long-range plans that may be in effect at libraries in neighboring counties can be useful.

Some planning committees benefit from a review of recent library literature, identifying and discussing broad trends that will affect library service in the years to come. Such a review can be expanded to include carefully selected articles that discuss broad social, economic, educational, and demographic trends as

well. These articles can even be assembled into a briefing book that committee members can use to frame their thoughts and discussions.

A carefully selected review of recent library literature can also be instructive.

All of these sources of information can be assembled to form a baseline, a common point of understanding for committee members, from which a countywide plan of service can grow.

References

Statistical Report '93: Public Library Data Service. Chicago: American Library Association, annual.

Van House, Nancy, et al. *Output Measures for Public Libraries: A Manual of Standardized Procedures*, 2d ed. Chicago: American Library Association, 1987.

5 *Translating the Data into a Plan*

The county planning committee has been established and given directions to prepare or update a county plan for library service. Pertinent data has been assembled. The next step involves the formulation of recommendations and the preparation of a written plan.

Expressing the Mission to Provide Service

A service plan should be introduced with a mission statement. This is a broad, inclusive declaration of the purpose of the plan and the activities it describes. PLA says a mission statement "establishes the scope of the [county's] activities for the current planning cycle and acts as a foundation for other planning phases. In one sense, the mission is like a job description: it gives direction to the library's daily activities" (McClure, et. al., 1987). A mission statement should be concise, direct, and dynamic.

Typically, the mission statement for a county plan will relate the need to make library service available to residents throughout the county in an equitable manner, according to the expressed needs of those residents.

The mission statement may also indicate that providing library service to the county is usually a combined responsibility involving the county, municipalities in the county that support their own public libraries, the system and the state. It may be appropriate to state briefly in this introductory mission statement the respective roles of these four agencies.

Typical Issues to Address

Following from the mission statement, the format of a county plan should include a statement of more specific goals and objectives and action steps. Goals can be defined as "long-range, broad, general statements describing a desired condition or future toward which the [county] will work during the next 3-5 years" (McClure, et. al., 1987). Goals often fall into two categories—service goals or management goals. Some sample goals might be:

- to provide open access to library collections throughout the county, regardless of a patron's place of residence;

- to reduce duplication of resources held by libraries in the county; or

- to reduce the differential between county per capita funding and municipal per capita funding.

Objectives can be defined as "short range and describe the results to be achieved over a specific time period. They are measurable, doable, time limited, begin with an action verb, and are more specific than a goal" (McClure, et. al., 1987). Objectives often fall into one of three categories: developing new services or operations; maintaining or improving the quality of an existing service or operation; or eliminating or minimizing existing problems. Some sample objectives might be:

- to complete a survey of reference collections in county libraries by 19__ to identify duplicated titles; or

- to target county funding per capita at 50 percent of the average municipal funding per capita in 19__, 55 percent of the average municipal funding per capita in 19__, and 60 percent of the average municipal funding per capita in 19__.

The written plan may also include a brief description, drawn from the existing and new data assembled as described in the previous chapter, of the current status of library service in the county. A section like this can identify existing library strengths and resources the county may want to build upon as well as deficiencies and resources the county wants to improve. This introductory matter may also include a description of existing system, regional, and statewide plans for library development, showing how the county's planning efforts coordinate with these broader goals for library development.

There are, however, four broad issues or themes that every county plan for library service can be expected to tackle:

- **Level of service.** What level of library service is appropriate to meet the needs of residents throughout the county?

- **Effective service delivery.** What is the most effective means of delivering the needed service to residents throughout the county?

- **Effective organization.** What is the most effective organizational and legal structure for delivering library service throughout the county (i.e., county library service, consolidated county library, contracting for service provision)?

- **Cost.** What is the cost of providing this service and how can the cost best be financed and distributed?

Several of these issues may assume a prominent place in the county plan, expressed as one or more of the goals. Clearly, all of these issues are woven together, and planners must be aware that it may not be entirely possible to address each one individually. It may not be possible, for instance, to consider appropriate types and levels of library service to provide to residents of the county without also keeping in mind the legal and organizational framework for delivering library service in the county or the likely cost of providing service.

Service Options

The services to be provided under the county plan can be examined from the sometimes competing vantage points of the services needed or desired by residents and the services that can in fact be provided by the county. On one hand, the services to be provided by the county should evolve from the findings of the planning committee's review of the data assembled for the study. Comments received at a public hearing, for example, might suggest the establishment of a certain new service. On the other hand, one key issue that will frame this discussion is whether or not it is effective, efficient, and appropriate for the county to assume any responsibilities for providing library service directly to county residents. If the county is inclined on principle not to assume responsibilities for direct service provision, then the services that will be available to residents will likely be those available at the public libraries in the county and in the surrounding area, regardless of comments received in a public hearing in support of some service that could be provided directly by the county.

Open access to the public libraries in the county becomes a key aspect of most county library plans. Open access allows residents of the county to use any of the local public libraries as if they were residents of the municipality. For the many counties that elect to rely on existing legal and organizational frameworks for providing service, the primary feature of the county plan becomes a commitment to compensate or reimburse those local libraries for services provided to county residents. Where this strategy is employed, compensation or reimbursement should, in fairness, be extended to libraries serving county residents, wherever those libraries may be—in or outside of the county. The plan may ascribe targets to improve the level of county funding.

As a result of their data-gathering efforts, a planning committee may determine that other or additional services may meet particular needs of residents. Or there may be services to the public libraries that the county could provide or coordinate. Examples of these include:

- bookmobile service.

- books-by-mail service.

- delivery service: this may be coordinated by the county in the context of the system's plan for service.

- interlibrary loan: this, too, may represent a county activity performed in the context of the system's plan for service.

- back up reference service: this is more likely to be performed when there is a county library service or a consolidated county library, although it is possible that one library in the county could be designated as the back-up resource for other libraries in the county.

- cash grants to libraries, usually for collection development.

- cooperative services: this may include coordinating acquisitions, cataloging and processing on a countywide basis, studying automation needs on a countywide basis, or providing services to users with special needs on a countywide basis.

Strategies for Delivering Service

As you identify the library services needed throughout the county, also consider the means or strategies for providing those services. Services may be delivered through:

- contracts for general library service with existing public libraries in and around the county,

- formation of a consortium of libraries to provide a specific service or a narrow range of services,

- contracts for service with the library system,

- establishment of a county library service,

- establishment of a consolidated county library, or

- a combination of any of the above.

Contracting for service with existing public libraries in and around the county typically emphasizes the open access aspects of a county plan. This strategy builds on existing resources and services. It minimizes the county's direct participation in providing service.

Contracting for service with the public library system may be appropriate when the county has determined that it is appropriate to provide a particular service directly, especially if it would make sense to coordinate that service with similar services provided in neighboring counties. A coordinated technical services operation might be one example. Here, careful attention to the planning environment is in order: the services provided by counties and the system can start to overlap, and the responsibility for providing service can become blurred.

Establishing a county library service may also be appropriate when a county determines to provide certain services to patrons or libraries directly. In this instance, the planning committee needs to explore whether the county library service should provide the service via contract or whether the county should create staff positions to carry out the service. Some county library services engage their own staffing and others do not. Separate staffing for county library service represents more of a hands-on approach to providing direct library service, retaining a greater degree of control over that service at the county level.

The response to the issue of the county's preference to provide service directly or through contracts with existing libraries or library systems will have a strong impact on service delivery patterns in the county.

Governance Configurations

Organizational and legal issues—questions of governance—are another key consideration in determining how to deliver library service in a county. The resolution of these matters will

have a bearing on the types of services that will be provided in the county and the corresponding funding strategies employed.

In most Wisconsin counties, the strategies for delivering library service county-wide rely on and build upon the existing legal and organizational structure for providing service. In every county, there already exists at least one individual municipal public library. Usually there is more than one existing public library in the county. Most counties have elected to build on these existing resources as they've developed plans to extend library service throughout the county.

Accordingly, most counties in Wisconsin have determined that appropriate levels of service can be met through those existing service outlets, and so the plan involves a measure of support and compensation that is paid to existing public libraries that provide the service. In most counties, the county does not provide library service directly, but enters into agreements with existing libraries in the county to provide service to county residents and then compensates those libraries according to the terms outlined in the county plan. This strategy has the advantage of working within existing legal and organizational structures. It also largely preserves the autonomy of individual local libraries. When the county provides one-sixth of the appropriation supporting a local library, statutes permit the appointment of one additional member to the library board; when the county provides one-third of the appropriation, statutes permit the appointment of two additional members to the library board (*Wis. Stats.*, 43.60(3)).

If a county elects to support county-wide library service by way of contractual agreements with existing libraries that provide library service to county residents, it should extend agreements and compensation to all legally established libraries that serve county residents. In those areas where library patrons cross county borders to use a nearby library, the county plan should include appropriate compensation to those out-of-county libraries.

Also note that a county may elect to provide services to county residents by way of contractual agreements with some other service entity, like the library system. For example, in the Northern Waters Library Service (NWLS), county funds are paid to the system to support a bookmobile service coordinated by NWLS.

Although most counties elect to extend library service countywide by way of contracts with existing public libraries, other organizational and legal models for service delivery exist that can be considered by a county library planning committee.

• **Establish a county library service.** According to statutes, a county may provide service to county residents through the establishment of a legal entity called a county library service (*Wis. Stats.*, 43.57(3)). Several counties have chosen this form of governance for extending library service into the county—Dane, Polk, St. Croix, to name a few. A county library service established under Chapter 43 operates with a seven-member board appointed by the county. While a county library service may enter into contractual agreements with existing public libraries to support some kinds of library service to county residents, many county library services offer direct public services to county residents. A county library service may operate a books-by-mail service itself (as in Polk County) or a bookmobile service (as in Dane County) or some other form of direct public service. Advantages to providing direct library service to county residents through the establishment of a county library service include: the potential to offer additional, unique services that may be beyond the capability of existing public libraries in the county (outreach services through a books-by-mail service, for example); and the retention of control over county-wide library services and responsibility for funding those services at the county level. One disadvantage of establishing a county library service is the possible dilution of fiscal resources available to reimburse local public libraries for services to county residents.

• **Establish a consolidated county library.** Chapter 43 also allows counties to assume full responsibility for providing library service to residents by establishing a single, consolidated library service entity for the entire county (*Wis. Stats.*, s.43.57(1)). Marathon County, Marinette County, and Brown County are among the

Wisconsin counties that have chosen this approach. Under this model, a seven-member board is appointed by the county and has exclusive control of all library service delivered in the county. Under this model, there are no independent local libraries; all local public libraries in the county are actually branches of the county library. Advantages to this form of governance include a greater ability to coordinate library service on a countywide basis; and an equalizing of the tax burden countywide, typically creating a greater equity of tax rates between city and rural residents of the county. One disadvantage of consolidated county libraries is a loss of autonomy at the local level.

• **Establish joint libraries within the county.** Under Wisconsin law, any two or more contiguous municipalities may establish a joint library "by appropriate agreement of their governing bodies" (*Wis. Stats.*, s.43.53). By a similar agreement, a county can also form a joint library with one or more municipalities within the county. A joint library offers one means of extending direct library service into areas of the county that are not served by an existing municipal library, and it offers similar advantages of reducing existing inequities between municipal and county tax rates. Any new joint library also removes additional territory from the county's tax base, if the joint library elects to exempt itself from the county library tax. The formation of a new joint library must be approved by the county, as well as the participating municipalities.

Service Costs

When a plan of service has been identified, the planning committee needs to make a realistic estimate of the cost to implement the plan. If the plan is predicated on the basis of reimbursing local libraries for providing service, a unit cost for the service(s) should be calculated. If the plan is predicated on the basis of providing direct public service or support services to local libraries, a budget should be developed that accounts for staffing needs, library materials, and operating expenses (rent, utilities, supplies, and so on).

Where the county plan involves reimbursing libraries for service on a per use or per circulation basis, a unit cost for that service must be calculated. A tension often exists between interests of simplicity and those of thoroughness. An argument can be raised that libraries that shoulder a larger proportion of reference service to county residents bear a larger cost and should receive greater compensation for this service. As part of a reimbursement plan, a costing formula could be developed that identifies unit costs for specific services (circulation, reference, storytimes, and the like), but the more elaborate the cost scenarios and the more a plan attempts to distinguish unit costs among different kinds of services, the more difficult it will be to administer the plan and the more difficult it will be to present and defend the plan to funding authorities.

Simplicity is a strong advantage. Many county plans base the cost of service to county residents on the unit cost per circulation, folding all operating costs into the unit cost per circulation, and including other services that are not necessarily directly related to circulation. Alternately, the county plan may acknowledge the additional contribution of certain libraries with compensation in addition to the unit cost compensation. A county resource library could receive a "reference improvement" grant in recognition of the additional cost of increased county reference traffic at that library.

In recommending a unit cost per circulation, planning committee members will need to consider whether the unit cost should be based on the unit cost for each affected individual local library or whether the unit cost should be based on the countywide average cost per circulation. There are various pros and cons to each approach:

• Assessing the unit cost on a countywide or average basis has the advantage of simplicity: a single, uniform rate is established for reimbursing or compensating libraries for service. This scenario, however, subsidizes libraries with a unit cost notably lower than the countywide average by compensating them at a rate greater than their actual cost, while it shortchanges libraries with a unit cost notably higher than the countywide average.

• Assessing the unit cost on the basis of each individual library's cost can more fairly reflect the cost local libraries incur by providing service. This approach is more difficult to administer, though, because multiple unit costs and rates of reimbursement must be calculated and maintained. It also provides no incentives for higher-cost libraries to economize (this presumes that libraries with higher costs per circulation incur those high costs through inefficient operations, when it is possible that the higher costs accrue to a deliberate choice by the local library board to provide a larger collection resource or additional public service staff, thereby increasing unit costs).

• A third variation on this theme is to assess the unit cost per circulation at the local cost per circulation not to exceed the countywide average. This option provides full and fair reimbursements to libraries that maintain lower, presumably more cost-effective rates of circulation while encouraging higher-cost libraries to reduce their costs.

Note that the Division's administrative rule regarding state-funded or system-funded reimbursements to libraries (PI6.11(2)) directs that reimbursements should be based on the local operating costs (total costs less capital costs).

A simple unit cost per circulation can be estimated by dividing total annual operating costs by total annual circulation. The Division for Libraries and Community Learning recommends the following two adjustments before making this calculation:

• **Exclude capital costs.** These are defined as one-time, extra-ordinary costs incurred in a given fiscal year. The cost of building a new building or an addition clearly represents a capital cost. Lease-to-buy contracts are considered capital expenditures. Other cost categories might not be as clearly delineated. Furniture and equipment is one such category. If the library routinely budgets for these expenditures, they may be considered an operating expense. But if they represent an unusual or special budget allocation, then they are more appropriately categorized as a capital expense. Sometimes local rules may prevail. Waukesha County, for example, classifies as a capital cost any expenditure that exceeds $500 per item.

• **Exclude expenditures relating to federally funded grants.** Like capital expenses, federal grant expenses usually represent non-routine costs. As atypical costs, they tend to inflate artificially a library's total operating costs and the resulting unit cost per circulation.

Be aware that county funding formulas based on levels of nonresident use can lead to variations in overall funding levels from year to year or to variations in the distribution of county funding among public libraries as levels and patterns of nonresident use in the county change from year to year. Some county boards may find this kind of yearly fluctuation in a funding formula unsettling or politically unacceptable. In those cases the county library planning committee should be prepared with an alternate rationale in support of adequate and equitable funding. Alternately, basing unit costs on a rolling three-year average can help to smooth out variations in the results of any annual costing study.

For any services provided directly by the county a direct cost estimate should be made. If the county will need to provide a facility to house these services, then the accommodations will need to be purchased or leased. The county will need to determine the associated costs, the level of staffing is needed to provide the service(s), the rate of compensation for staff, the benefits to be provided. A decision will have to be made if as part of the plan of service the county will purchase library materials. That covers only a preliminary list of topics that would need to be addressed.

Funding the Plan

With a series of service goals and a cost estimate in place, the planning committee needs to develop a strategy for funding the plan. In all likelihood, this will prove the most crucial element in the plan. It addresses the fundamental questions of who pays and how much. The funding strategy should produce

sufficient funding to meet the needs of the program, it should be equitable for all residents in the county, it should consider exemption issues and maintenance of effort issues.

During planning, examining the fiscal impact of current or proposed appropriation amounts in terms of tax rates may be necessary. The *Wisconsin Library Service Record* presents county tax levy rates and per capita tax rates for the most recent year. Rates are given for municipalities with libraries and for the county outside of those municipalities.

In order to calculate the impact of proposed levels of funding, it will be necessary to obtain the latest state equalized assessed valuations for all jurisdictions in the county. The Wisconsin Department of Revenue (Bureau of Local Financial Assistance, Division of State-Local Finance) publishes this information annually in *Town, Village, and City Taxes: Taxes Levied - Collected*. The County Clerk's Office may have this information, too. Equalized assessed valuation estimates should be used rather than local assessed values to ensure the comparability of calculated tax rates. If the planning committee wishes to calculate tax rates for municipalities in the county, the assessed value for any municipality that is divided by a county line should include the value of the municipal property found in both counties.

To calculate the library tax levy for a municipality with a library, planners should divide the equalized assess valuation of the community less the value of any tax incremental financing districts (but adding the assessed valuation in an adjacent county if necessary) by 1,000. Then one divides the proposed library support by the result. This will be the tax levy per $1,000 of assessed value. The municipal levy calculated will probably be between 0.100 and 1.500. The 1993 state average was 0.800.

Be aware that some libraries benefit from support from a trust fund. In some cases, that support is substantial. Levy rates for these libraries will be artificially low in comparison with other county libraries that do not have trust fund income or other non-tax support. When a county includes a mix of libraries, some supported predominantly with local tax dollars and others supported to some degree with private or trust funds, it may be more effective to compare the levy rates of municipally funded libraries against the levy rates of the other libraries, factoring in trust fund income and treating it as if it were tax support.

To calculate the tax levy for the county, planners should begin with the total equalized assessed value for the county. From this amount the equalized assessed value of any county communities with a public library who are exempting themselves form the county library tax is subtracted. The amount remaining is divided by 1,000. The proposed county library support is divided by that result. In most cases, the county levy calculated will probably be between 0.010 and 0.500. The 1993 state average for counties was 0.252. In some towns, state shared revenue funds may be used to support library service. Where state shared revenue is used to offset the county tax levy, a lower actual mill rate will result.

A low or a high tax rate by itself is not inherently good or bad. For example, a low mill rate, coupled with high assessed value and low population can nevertheless produce a high level of support per capita.

Identifying Sufficient Funding Levels

An obvious goal of any plan should be to generate sufficient resources to fully fund the activities called for in the plan. If there are substantial revisions and additions to the plan, or if it's been a long time since the county plan was last reviewed, there may be a discrepancy between current funding levels and those needed to implement the plan. A major increase in funding may be politically impractical.

It may be possible to phase in increased costs over a period of time, leading to full funding. How long that phase-in period lasts is a matter of local discretion, and may well be affected by the size of the discrepancy between current and desired funding levels. Typically, however, it is advisable to structure a phase-in period that will be accomplished before the next scheduled major review of the county plan. If the next major review is contemplated five years from now, the timetable for phasing in full funding should be no more than five years long. Then the planning committee

charged with that major review five years hence will be able to assess how successful efforts have been to secure full funding.

Seeking Equitable Funding

Equity of funding is always an important concern. One point of equity is the disparity between municipal and county funding levels. Historically, county funding per capita in Wisconsin has lagged well behind municipal funding per capita. The ratio between municipal and county nonresident funding has long been roughly 3:1. In 1993, the average municipal support per capita was $23.67, while the average county support per capita was $8.88.

In the simplest terms, equity results when available revenues support the fair cost of the services to be provided. In seeking full and fair funding, the county plan should redress any inequities that may exist.

Uneven Use of Existing Libraries / Uniform Taxation

In looking at nonresident use of existing public libraries it often becomes clear that the level of use can vary substantially from municipality to municipality. To a large extent this is determined by the proximity of a town to existing libraries. The question arises as to whether there is a mechanism for allocating cost for library service based on actual use.

It is the position of the Division for Libraries and Community Learning that a uniform county tax must be levied on those areas of the county which do not exempt themselves from the county library tax because they already tax for municipal library service.

Although this may appear at first glance to be inequitable, it is an essential requirement for providing countywide public library service. Each resident has an equal potential or opportunity for needing or using library service, and therefore each town should pay equally for that potential. This should be a motivating factor for developing a countywide plan which provides for convenient access to public library service for all residents.

Exempting from the County Tax

Statutes allow a municipality to exempt from the county tax for library service if the municipality's levy rate for library service meets or exceeds the rate from the county (*Wis. Stats.*, s.43.64(2)). This has clear implications for the funding of the county's plan for library service. As a municipality exempts itself from the county tax, it removes the value of the property in the municipality from the tax base available to the county for generating revenue to support the county's plan. The rationale behind the exemption option is to address a situation where taxpayers might be taxed twice for library service—once by the city and again by the county.

In many parts of the state, but not all, municipalities do exempt themselves from the county tax when their tax rate for library service exceeds the county's rate.

Where the county's plan for library service focuses on extending service to residents of the county who live outside of municipalities that maintain a public library, it is entirely appropriate to encourage municipalities to exempt from the county tax. In a setting like this, the county and municipalities assume responsibilities for service to county residents and municipal residents respectively, and it is appropriate for the county to bear the sole cost of providing service to residents of the outlying county area while the municipalities bear the cost of providing services to their residents.

Where the county's plan for library service goes beyond extending service to residents of the county who live outside of municipalities that maintain a public library—when the county's plan for library service includes direct services and support for municipal residents *and* residents of outlying areas alike—an argument could be made that the municipalities should contribute to the support of those services. An example of this might be a plan that includes a coordinated technical services program for the libraries in the county. Because of this component that provides service and support to all of the libraries in the county (and, coincidentally, all of the residents in the county), it could be argued that the municipalities should contribute to the funding of the county's plan for library service.

Issues relating to exemption from the county tax cut to the heart of basic equity concerns of who should pay for what services.

Maintenance of Effort

Statutes require that a county or municipality maintain its funding effort in order to retain membership in its public library system and enjoy the services and benefits of that membership (*Wis. Stats.*, s.43.15(2)). A county maintains its level of effort if the county's support for library service is equal to or greater than the average of the county's support for library service over the previous three years. This, too, has clear implications for the funding of the county's plan for library service.

The maintenance-of-effort provision is meant to protect libraries from capricious reductions from funding agencies. Meeting this requirement, though, can pose a challenge for a county where a newly established municipal library or a newly exempting municipal library reduces the tax base that can support funding for county library service. When the county tax base decreases as a result of increased exemptions, statutes allow a county to reduce funding in proportion to the reduced tax base (*Wis. Stats.*, s.43.15(2)b)). The planning committee must be sensitive to these conditions, if they exist, and monitor closely compliance with the maintenance of effort provisions.

"Crossover" Use

"Crossover" borrowing occurs when a resident from a municipality with a public library borrows from the public library in another, usually adjacent, municipality. Under the current organization of library service in Wisconsin there is no clear line of responsibility for providing support or compensation to the lending library in this situation. Typically, a library tax has been collected and distributed to the municipality of the borrowers' residence. If the borrower's library exempts itself from the county tax, as most do, there is no funding generated at the county level to support this transaction. Open access provisions and the "netting out" of crossover use is meant to provide at least partial compensation to local lending libraries. Yet in some parts of the state, the volume of crossover borrowing is substantial, to the point where some local libraries question whether they can afford to participate in this service without additional compensation.

While proposed statewide initiatives like INFORM WISCONSIN are designed to address this concern, some counties have chosen to address this issue in the context of the county library plan. Whether or not a county adopts this approach will probably hinge on these three issues:

- **The plan's overall perspective.** The county plan may be viewed as a vehicle for serving *all* residents in the county or as a vehicle for ensuring adequate service is available to those residents who live outside of municipalities with existing libraries. Crossover borrowing is more likely to be supported in the former case.

- **The budget for the plan.** Obviously, if generous funding is available to support the entire plan, additional services such as compensation for crossover borrowing can be considered. If compensation is provided on the basis of circulation unit costs, one should note the Division's administrative rule regarding that calculation (PI6.11(2)).

- **The concerns of public libraries in the county.** If the local libraries in the county perceive crossover borrowing to be a concern, surely that concern will be conveyed to the county library planning committee and to the county board.

Crossover borrowing can be addressed in the context of a county plan, but in doing so the county's fiscal resources are often diluted and there is less funding to pursue other needed library initiatives. The issue of compensation for crossover borrowing can also have the effect of pitting library against library, when unity is essential to advancing the county plan for library service.

Some public library systems have elected to use state aid for systems to help resolve this

issue. Some other public library systems have designed service programs which benefit libraries that are net lenders to a greater degree than net borrowers.

Cross-county Borrowing

A variation on the crossover borrowing theme occurs when a resident from one county borrows material from a library located in another county. As with crossover borrowing within the county, there is no clear line of responsibility for providing support to the lending library when a borrower crosses a county boundary to use a neighboring library. The issue is further complicated by the fact that sometimes the neighboring county is in the same library system, and other times it may be in a different system. Each situation presents subtle differences.

It is a long-standing goal of the Wisconsin library community and the Division for Libraries and Community Learning that every Wisconsin resident should be able to use any public library in the state to meet their educational and information needs, without regard to political boundaries. It is also a goal that all public libraries should receive equitable reimbursement for serving nonresidents. A county planning effort should reflect the reality that library patrons in multi-county systems can use libraries without regard to county boundaries within the system area and the goal that library patrons be able to use libraries without regard to system boundaries. The county plan should not necessarily focus exclusively on the county itself but should consider a broader, areawide view.

System membership requirements and statutes dictate that broader view. By virtue of system membership agreements and *Wis. Stats.*, s.43.24(2)(d), a public library participating in a multi-county library system is required to serve residents from the entire system area regardless of whether those residents live in a different county. *Wis. Stats.*, s.43.17(10) requires public libraries to honor a valid borrower's card issued by a public library in adjacent public library systems (with the exception of public libraries located in the Milwaukee County Federated Library System). Under *Wis. Stats.*, s.43.17(11), however, a public library may refuse to honor the borrowers' cards of a public library in an adjacent system if the library is not reimbursed adequately.

On a simple level, there is a logic to the argument that reimbursement should follow the patron's activity irrespective of county lines, passing from the borrowing county to the lending library (probably via the lending county). That simple logic can be confounded, however, by political reality if the county board is reluctant—as some are—to transfer funds from one county to another.

The introduction of a county or system border between borrowing community and lending community complicates the transaction, but many of the same issues apply to cross-county borrowing that apply to crossover borrowing within the county.

As libraries in the county track nonresident use, separate categories can be kept to tally the use by residents of other counties. The convenience of geographic proximity suggests that most cross-county use will occur with residents from adjacent counties, but that may not always be the case. Libraries in counties with resort economies that attract seasonal and vacation populations may well receive traffic from all across the state.

As nonresident use surveys define these patterns, the county library plan should seek to secure support on behalf its net lenders in this situation. It should seek to provide support on behalf of its net borrowers as well.

Counties have the primary responsibility to provide library service to those residents who live outside municipalities with libraries. If those residents are best served by using public libraries in an adjacent county within the same public library system or another public library system, the county should make provisions in its countywide plan for library services for reimbursing those public libraries for serving its residents. In general, counties should reimburse libraries located in adjacent counties on the same basis that they reimburse libraries located in their own county for serving residents who live outside of municipalities with libraries.

Public library systems also have a responsibility to residents in their system area who

find it more convenient to utilize public libraries in other counties within the system area or in an adjacent system. Public library systems should play a leadership role in the development of intersystem agreements that facilitate nonresident borrowing across system boundaries and that address the issue of equitable reimbursement, and in the negotiation of agreements between counties and public libraries in adjacent systems.

Presenting the Plan

The general content of a county library plan has been addressed in the preceding sections. A written plan should include:

- a mission statement,
- a description of the current service environment,
- a statement of goals and objectives,
- an estimate of the cost to provide the services outlined in the stated goals and objectives, and
- recommendations for allocating those costs and generating the necessary fiscal support

A county plan can become fairly elaborate and detailed. Always bear in mind the intended audience(s) for the plan—the county board of supervisors, libraries in the county, interested residents, system staff, and so on. Keep the format and presentation of the plan simple and direct. Choose examples and details carefully. Introduce detailed statistical summaries and supporting data in appendixes so that the body of the text can remain more concise and accessible. Provide a short executive summary of the plan that highlights key provisions and can be used to promote the plan with funding authorities.

References

McClure, Charles R., et al. *Planning and Role-Setting for Public Libraries: A Manual of Options and Procedures.* Chicago: ALA, 1987.

6 *Getting the Plan Adopted*

After the planning document has been prepared, the planning committee begins a most important step in the process: advancing the plan for adoption by the county board of supervisors and other appropriate funding agencies. This process usually involves developing consensus and support among affected groups and individuals; presenting (and selling) the plan to the county board; and seeing to regular updates to the plan.

Building a Unified Front in a Political Setting

In most cases, the effort to advance a county plan—or any plan—will benefit from the combined support of individuals and institutions that are affected by the plan (positively or adversely) or that will contribute to its implementation. If the planning environment has been carefully structured and the planning committee conscientiously chosen, many of these groups and individuals will have been involved as part of the planning process.

To the extent, though, that some groups have not been directly involved with the county library planning effort, the planning committee should work to develop consensus and support among the plan's constituencies using the following strategies:

- Public hearings may be held to solicit reactions and comments from general or targeted audiences in the county. Statutes require one or more public hearings prior to the adoption of the initial county plan (*Wis. Stats.*, s.43.11(3)(a)). Similar hearings may be beneficial before a major revision to the county plan is adopted.

- Individual public libraries in the county can sign on to the plan, indicating their support.

- The system may be asked to review the draft county plan. The plan should be in conformity with and foster the system's annual plan for library service.

- The Division for Libraries and Community Learning may be asked to review the draft county plan. The plan should be in conformity with the statewide plan for library development as well.

Presenting the Plan to the County Board of Supervisors

As the planning committee completes its work on the plan, preparations should be made to present the plan to the county board of supervisors and other appropriate funding authorities. It will be useful for the planning committee to consider the advantages and disadvantages of different strategies for presenting the plan to the county board.

Local circumstances and protocols will guide a committee's strategy in this matter, as will the anticipated reaction to the plan: different approaches may be appropriate depending on whether the county board is likely to be favorably disposed or antagonistic. The planning committee should take some time to assess the inclinations of the county board so that the presentation is not blind-sided with an unexpected hostile reception. Individual members of the planning committee may want to contact their local county board representatives prior to the meeting to provide a briefing on the content of the report. This might be done informally or as part of a coordinated effort on the part of the planning committee.

Strategic considerations surrounding the

presentation to the county board involve the following issues, among others:

- Who will make the actual presentation? In many cases it will be a member of the planning committee, probably the chair of the committee. If a county board member was a member of the planning committee, it could work to the plan's advantage to include him or her in the presentation. A nonlibrarian may be perceived as more impartial and therefore make the most effective presentation. In other cases, it may be advantageous to include representatives from county libraries—librarians, trustees, patrons—in the presentation. Will there be a place in the presentation to demonstrate general support for the plan by county residents? Can a number of library users be encouraged to attend the presentation and register their support? Would that kind of display convince the county board or dissuade them?

- When will be plan be presented, and in what context? If the plan is presented as part of the county's regular budget cycle and hearing, there will probably be other major county service and budget initiatives on the agenda. The library's presentation will have to be considered in that context. If on the other hand, the presentation is made to a special meeting of the county board or a workshop session, county board members will be less distracted by other issues and will be more able to devote their complete attention to the presentation. The library planning committee is likely to be allowed more time to make the presentation as well. Always be aware of the broader issues confronting the county board and understand that seemingly unrelated issues can affect the board's deliberations.

- Is the presentation concise, succinct, dynamic, and persuasive? If an executive summary of the plan was prepared, it can be used as a handout at the presentation. Consider using simple graphs and charts to present the case, documenting increased use, or a shifting balance between city and county funding, and so on. An audiovisual presentation—even something as simple as overhead slides—can effectively grab the board's attention.

The committee should not overlook other key individuals who may not be elected members of the board but who may be instrumental in securing approval of the plan. These may include other county department heads or possibly individual employees who work closely with the board. Opinion leaders throughout the county who were not directly involved with developing the plan should be contacted, too.

Updating the Plan

A plan should not be static. Conditions in the county will change. New limitations can be imposed. New opportunities can be presented. The county plan for library service should be flexible and responsive to these changing conditions.

PLA's *Planning and Role Setting for Public Libraries* recommends a planning model with primary and secondary planning cycles. The planning model recommends that any plan should be examined annually. It should be refined and redirected as necessary to respond to new conditions and prospects. The annual review process also provides valuable feedback on the progress made toward the goals expressed in the plan. It is often worthwhile to use these annual progress reports as a vehicle to report to the county board, too. If these progress reports can be scheduled apart from the budget cycle it may produce more routine and continuing contact with county board members can be maintained. Then, at a pre-determined interval, typically in three to five years, the plan should be subjected to a more thorough review, effectively rebuilding the plan from the ground up.

The county plan for library service should address when and how this review and recycling will be accomplished. The plan should specify a mechanism for an annual review and course correction. The plan should direct that a thorough re-examination occur at least once every five years. As always, changing conditions—political, economic, among others—may necessitate a major review and revision cycle sooner than planners had originally anticipated in the schedule for review.

Annual review and refinement is one key to the success and continuity of any plan. Usual-

ly the committee or group that was responsible for developing the plan takes the responsibility for these annual reviews. Sometimes a subcommittee of the original group is formed to complete the annual reviews. Sometimes this responsibility is passed to another group.

The major review and revision cycle brings the process full circle and starts planning anew. Commonly a new planning committee is appointed. Members from the previous planning committee—sometimes as many as one-half of the previous committee—may be appointed to the new committee in order to provide some measure of continuity. On the other hand, it may be more productive to involve an entirely new group with the development of a new plan. The new committee will then proceed to assess the county's new library service needs, reviewing existing data, gathering new data it may need; the committee will translate that data into a plan; and it will promote its adoption with the county board.

7 *Conclusion*

Planning in and of itself is not a panacea. Planning will not solve every budget woe or meet every service need. But planning does provide an important tool for advancing and improving library service. It sets the stage and orchestrates the players so that improvements can be made, changes implemented, and new directions taken, all to the advantage of the community at large.

Planning for library service at the county level operates in a complex setting. This manual has attempted to describe some of the more common issues addressed by county plans—service goals, funding levels, equity of use, equity of fiscal support, among others. Unfortunately, amid the great variety of Wisconsin's 72 counties, there are more issues to address, problems to solve, services to implement and projects to advance than this brief handbook can cover.

Within the framework presented here, balanced by other procedural guides such as *Planning and Role-Setting for Public Libraries*, county library planners should be able to fashion a planning strategy that will deal with the specific and distinctive local issues facing the county and its libraries.

One key to any successful planning process is to always remember the overall planning and service environment. Public libraries do indeed operate in a political setting. Support must be forged among the libraries' elected and appointed funding authorities. One of the most important audiences for the county plan—if not *the* most important audience—will be the county board. In many instances, the presentation of the libraries' case to the county board will be the key.

To that end, keep it simple, keep it compelling, keep it responsive to the communities' needs, and keep it responsible. With this perspective, library supporters will be able to launch a continuing campaign to improve library service to residents throughout the county.

Appendix A: Surveying for Nonresident Borrowing Patterns

Planning for county library service requires a basic understanding of current patterns of public library use. In many cases, planners will want to know who is using each library in the county and to what degree. What is the balance between use by residents of each library's primary taxing jurisdiction and use by others? Use patterns are often a key element in planning because tax equity suggests users pay their fair share of the library's cost. Use surveys are important because they often contribute to deciding the amount and distribution of county funding for local public libraries.

This appendix provides a detailed description of factors to consider when preparing to survey libraries for nonresident borrowing patterns. The county planning committee is encouraged to implement the methods described here, although adaptations may be made to suit specific local needs.

Be aware, however, that adaptations may restrict the committee's ability to compare results with neighboring counties. Counties should therefore give *strong* consideration to coordinating use surveys with other adjacent and system counties. The system should coordinate this process. The county planning committee may also contact the staff of the Division for Libraries and Community Learning for assistance in developing a specific methodology, or for an assessment of how adaptations may affect the comparability of results.

An Overview

Several counties in Wisconsin are currently engaged in the monitoring of local public library use patterns. This requires common agreement on how to define "public library use." The measure most commonly adopted as a definition of public library use is circulation.

Admittedly, circulation of materials represents only one aspect of the entire range of services offered by public libraries. Libraries also offer a wide range of other services to residents and nonresidents alike: reference, programming, in-house use, and so on. It does not necessarily follow, for example, that 20 percent of a library's reference use or in-house use is generated by nonresidents simply because 20 percent of its total circulation happens to go to nonresidents.

Circulation is nevertheless accepted as a reasonable substitute for the total service provided for reasons to do with accuracy and simplicity, specifically:

- Circulation is generally considered to be more accurate than other measures of use. Libraries have more experience gathering this data, and there is greater consistency from library to library with regard to taking this measure than there is with regard to other measures.

- A costing model that focuses on one measure—circulation—is simpler, easier, and less costly to administer than one that factors in a wider (and arguably more representative) range of library services. A more detailed cost model with separate components for different services could always be adopted at local option, if needed.

Circulation is often accepted as a reasonable proxy for the total service provided by libraries, and the cost per circulation transaction is often accepted as a reasonable proxy for the overall unit cost for library service.

Procedures for measuring circulation will depend on two fundamental decisions planners

must make. The first concerns the identification of users by place of residence. Participants in this data-gathering effort must agree upon the specificity of information needed to support the county's planning effort. As a rule, libraries should only gather data that is essential to their planning effort; gathering additional data only makes the process needlessly cumbersome. The more categories of users the data gathering strategy proposes to track, the more complex the strategy becomes. Consistency of these definitions within a given county and between a county and its neighboring counties will improve the usefulness of the data.

- At the very least, within the home county, borrowers should be tracked according to the library taxing jurisdiction where they reside. This would include residency categories for patrons who reside in each of the municipalities in the county that support a public library, plus a category for all residents in the outlying county area.

- County borrowers may be further classified according to their town of residence. This creates a more complex data gathering strategy, but produces a clearer understanding of geographic use patterns within the county.

- Borrowers who live outside the county could be identified by home county, home community, the county where they pay their library taxes, or by public library system. Typically, a more detailed classification of cross-county users will only be necessary for immediately adjacent counties because cross-county borrowing declines rapidly as distance increases. (A survey addendum to the 1993 public library annual report suggests that no more than one to two percent of the total public library statewide circulation involves borrowers from beyond the system area and counties immediately adjacent to the lending library; in some individual cases, this rate may be higher or lower.)

The second decision that must be made concerns the data collection burden that will be placed on the libraries. Partly the data collection burden is determined by the level of specificity in defining borrowers' residences. Partly it is determined by the methods available to individual libraries to gather the data:

- **Computerized circulation systems.** These can often be configured to capture this data automatically. When the libraries in a county operate an automated circulation system, the computers may be programmed to monitor and tally *all* nonresident use and produce a complete, annual total of nonresident use.

- **Manual circulation systems.** These will require additional, often labor-intensive steps to gather this important data. For nonautomated libraries the costs of daily, continual data gathering on nonresident use may well outweigh the benefits. For these libraries, periodic sampling of nonresident use will be more appropriate.

Public library use surveys then will measure some library output. Circulation is commonly chosen. The survey will also attempt to locate the residency of the user. Data will either be collected throughout the year or on a sampling basis. All sampling libraries must use the same data collection techniques for the sample to be comparable and valid.

Establish Uniform Survey Definitions

The purpose of the library use survey is to determine the use made of a public library by persons from the home community and those residing in taxing districts outside the primary taxing district of the public library. To complete this task it will be necessary to learn the residency of nonresident users, and to measure the circulation to each identified group. Adopting the following definitions will better ensure comparability of collected data within the county, from county to county, and statewide:

- **Public library use.** The circulation of a legally established public library's materials to users of the public library. Although public libraries provide a wide range of services, for practical reasons of data collection circulation

will be considered a valid estimate of total library use.

• **Circulation.** A circulation transaction is the act of lending an item from the library's collection for use generally (although not always) outside the library. This activity includes checking material out either manually or electronically, and also renewing the loan of materials previously borrowed. Each of these is reported as a circulation transaction. Items included are those circulated from all library units (such as main library, branches, bookmobiles, and book-by-mail programs) administered by the library board. Interlibrary loan items provided to the library and circulated by the library should be included. Interlibrary loan items sent to other libraries should not be reported as circulations.

• **Library taxing unit.** A municipality that has established a public library under *Wis. Stats.*, s.43.52; or a group of two or more contiguous municipalities that have established a joint library under *Wis. Stats.*, s.43.53; or a county taxing for library services under *Wis. Stats.*, s.43.57.

• **Residency of patron / borrower.** Patrons' residency must be properly identified and classified in order for a library to tally resident and nonresident use. In most instances, classifying residency is not complicated and is based on identifying the taxing jurisdiction to which the patron pays taxes to support library service. Residents of a municipality or a joint library are considered residents of that particular library taxing unit. Likewise, residents of a county who live outside of any existing local library service jurisdiction are considered residents of the county. This does *not* require the collection of data at the township level within the county. However, township data could be collected if wanted for another purpose and summed to produce the county nonresident statistics.

Some patrons may fall into more than one of these categories. Where a municipality has chosen *not* to exempt from the county tax, a patron will be paying both a municipal tax for library service and a county tax, and could be considered either a municipal resident or a county resident or both. For purposes of this data-gathering effort, the patron's classification as a municipal resident should take precedence.

• **Resident borrower.** A resident borrower or patron is an individual who resides within the jurisdiction of an individual library taxing unit. Each library will define resident borrowers according to local practice and policy. Usually a library will extend borrowing privileges to individuals whose primary domicile is within the jurisdiction of the library taxing unit. Some libraries also extend borrowing privileges to an individual who owns property in the jurisdiction of the library taxing unit, even though the individual may maintain a primary residence elsewhere, arguing that the individual, as a local property owner, is supporting the library through taxes. For purposes of this tally, such individuals can be considered resident borrowers.

Identify the Goals for Measurement

Every library in the state gathers data that describes the total circulation for the library. A nonresident borrower survey will attempt to answer the following questions for each library in the county:

• Of the library's total circulation, how many transactions were to nonresident library borrowers?

• Of the nonresident circulation, how many transactions were to persons who pay property tax only to the county for library service? These individuals represent borrowers who reside in the same county but outside of any existing library service jurisdiction. Support for serving these residents should be provided through the county's plan for library service.

• Of the nonresident circulation, how many transactions were to persons who pay property taxes to another municipality within a system for local library service? This represents use by

residents who have their own "home" library either within or outside of the county but choose to borrow from other area libraries. Under the terms of system participation, member libraries must guarantee open access to other system members (*Wis. Stats.*, s.43.24(2)(c) and (d)). This number should be reported to the respective "home" library communities.

- Of the nonresident circulation, how many transactions were to system nonresidents paying only county taxes for library service? These individuals represent county (that is, non-municipal) residents from other counties within the same library system. Under system membership requirements, open access must be guaranteed to these individuals. Support for serving these residents should be provided through each respective "home" county's plan for library service.

- Of the nonresident circulation, how many transactions were to nonresidents paying property taxes for library services to another municipality in another library system? This group represents nonresident users from counties not in your system who have their own "home" public library. Under system membership requirements, a lending library has greater options for reducing service or refusing to serve nonsystem borrowers if adequate reimbursement is not received (*Wis. Stats.*, s.43.17(11)(b)). This number should be reported to the respective "home" library communities in the adjacent counties.

- Of the nonresident circulation, how many transactions were to nonresidents paying only county taxes for library service in a county outside the system? These individuals represent county (that is, non-municipal) residents from other counties in different library systems. Under system membership requirements, a lending library has greater options for reducing service or refusing to serve nonsystem borrowers if adequate reimbursement is not received (*Wis. Stats.*, s.43.17(11)(b)). Support for serving these residents should be provided through each respective "home" county's plan for library service.

- Of the nonresident circulation, how many transactions were to persons from another state?

Determine a Survey Methodology

Public library systems can train and assist public libraries in collecting the information necessary to complete the library use survey. In order to collect the desired information, libraries must either count all circulation transactions by residency of user throughout the year, or complete a random sampling of nonresident use. Annual totals may be available for those libraries with automated circulation systems. Sampling may be the only practical alternative for libraries that are not automated.

Sampling methodologies described in *Output Measures for Public Libraries* (Van House, 1987) can be adapted for gathering nonresident use data. Some sampling tips from *Output Measures* include:

- be consistent;

- decide in advance exactly what will be counted and how;

- all staff who collect data need training and guidance;

- minimize the impact of data collection on library services and users;

- minimize the obviousness of measurement activity whenever possible;

- the more painless the count, the more accurate; and

- allow time for learning.

To conduct a nonresident borrowers survey planners will need to develop specific data collection procedures, create a data collection worksheet, select a data collection or sampling

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period (for those participating libraries that are not automated), and compile and edit the results.

Develop Data Collection Procedures

To collect the necessary information, libraries must collect circulation information by residency of the library user. This task will be easier for those libraries and systems that adopt user registration methods that allow effortless user identification. For example, South Central Library System libraries register users by their primary taxing district (the municipality or county to which the user pays taxes for library services). Waukesha County clearly labels library cards with a municipal code indicating residency and ensures that the cards reflect the user's current address. Libraries with automated circulation systems probably can provide this information from existing records.

If current residency information is not available from the user's library card, the librarian must learn the user's home residence. A county grid map with street references can be used to assist the user in describing the user's home address. For locations outside the county, the user's city, town, or village and county address should provide enough information for the librarian to classify the circulation correctly.

After user residency is determined, the circulation can be recorded. A sample data collection form is provided in the following section. Data should be periodically summarized by the public library and transmitted to the survey coordinator, usually a designated system staff member).

Practical experience from Waukesha County Federated Library System members has resulted in the these general procedural observations:

- Library staff are quite good at determining residency for non-resident users from nearby communities, but are less accurate for unfamiliar municipalities. User residency information must be gathered accurately since sampling periods are later converted into annual estimates which will amplify any inaccurate user residency information. Staff should be encouraged to use a grid map for residency location.

- People often move without notifying the library of a change of address. Staff should ask patrons periodically if they still live at the address shown on their card. Certainly current address information should be verified when a card is renewed. Cards without expiration dates can cause less and less accuracy in data collection.

- Renewals by telephone requires re-verifying the users address.

- Care must be taken when issuing temporary cards that the patron's residency is correct. Sometimes this verification is left until a permanent card is issued.

- Some libraries issue "business" or "school" library cards. Persons using these cards can be classified as resident according to their home address or the school or business address. A decision regarding how residency will be determined in these cases must be made before use is counted.

- Public libraries collecting statistics should review the compiled period data provided by the system or the county to ensure that no typing or transcribing errors have been made.

- Libraries should keep copies of all instructions provided to staff for data collection so that staff have immediate access to them if needed. New staff orientation should include a review of procedures and an explanation of the importance of the collected data.

Create a Data Collection Worksheet

In order to collect nonresident use information for each public library in the county, a standard form should be provided to each member. Each county will require a different version of the form, even if the public library system is coordinating data collection for all system counties. A sample form is provided on the next page. A supplemental map is provided

Circulation by Patron Residency

(Residency is determined by where a patron pays taxes to support library service)

	User Residency	*Circulation*
	SAME COUNTY	
1	City Library A (home community)	
2	City Library B	
3	City Library C	
4	Village Library D	
5	County residents	
	ADJACENT COUNTIES	
6	Member County B / City Library E	
7	Member County B / City Library F	
8	Member County B / county residents	
9	Member County C / Town Library G	
10	Member County C / City Library H	
11	Member County C / county residents	
12	Neighboring System County E / City Library I	
13	Neighboring System County E / Village Library J	
14	Neighboring System County E / county residents	
	NONADJACENT COUNTIES	
15	Member County D	
	List other counties / same system	
16	Neighboring System County F	
17	Neighboring System County G	
	List other counties / neighboring system(s)	
18	Out of state	
	TOTAL	

Table A-1

on the following page to help interpret the form.

On the form, the home community is identified as "City Library A." It is also identified with a number 1 in the far left hand column. These identifiers correspond to the map provided on the following page. Similarly, borrow-

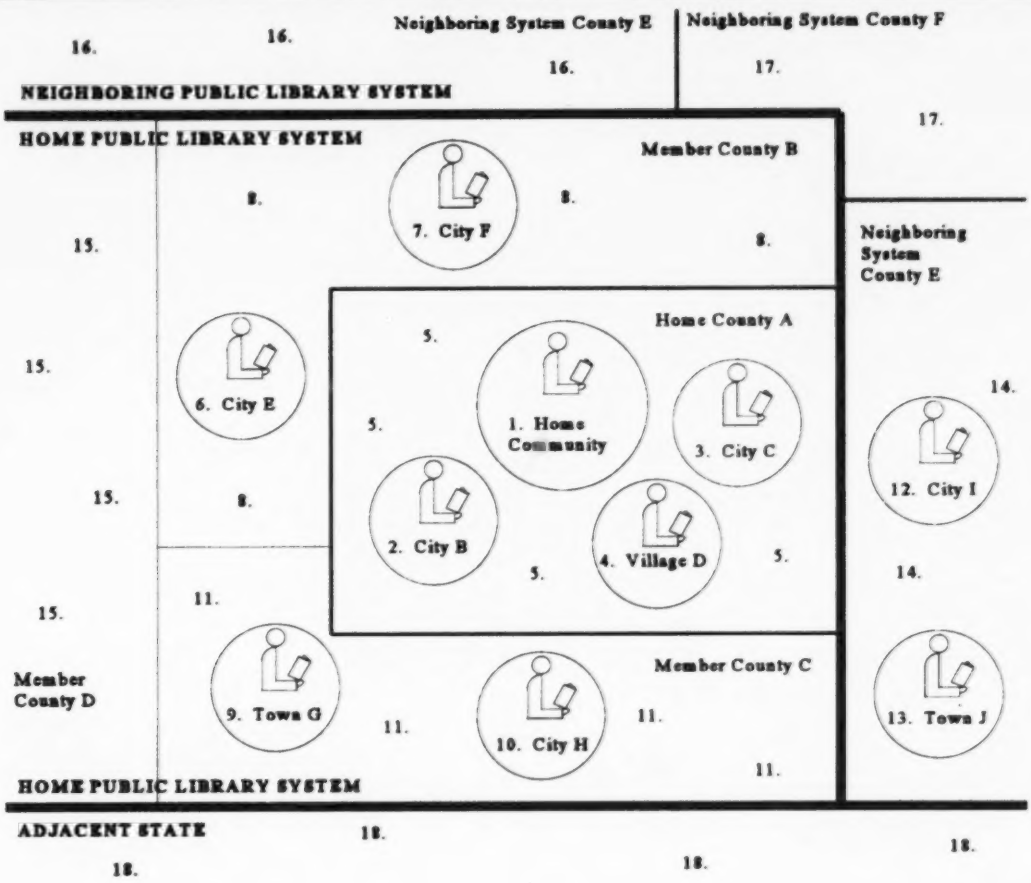

Figure A-1

ers residing in "City Library B" are identified with the number 2 and "County residents" who live in the same county as the home library are identified with the number 5. By comparing the sample form provided in Table A-1 with the map provided in Figure A-1, readers will be able to interpret the relationship between the home library and its neighboring libraries.

The actual form for gathering this information may be longer or shorter than the example given here, depending on the number of libraries in the same county, the number of adjacent counties and the number of libraries in those adjacent counties.

The sample form is divided and ordered into three broad resident classifications:

- **Residents of the same county.** Classify residents by their library taxing unit—municipalities, joint libraries, or the county. On the form and the map, this grouping is referred to as items 1 (residents of the home community) through 5 (county residents—those living in areas of the county not served by a municipal library—from the same county as the home library)

- **Residents of adjacent counties.** Depend-

ing on the level of detail needed in the summary of results, classify residents according to their specific, individual library taxing unit (individual municipalities, joint libraries, or the county); or combine all residents of municipalities into a single category and maintain just two residency categories for each adjacent county (combined municipalities and county). On the form and the map, these borrowers are identified as items 6 through 14.

• **All other borrowers.** This includes residents from nonadjacent counties in the same system, residents of nonadjacent counties in other systems, and out of state residents. On the form and the map, these borrowers are designated by items 15 through 18. For most libraries, circulation to this group will represent a very, very small proportion of the total, and the need to classify more closely a borrower's residency (by county, or by municipality, for example) is questionable. For most libraries, there is not sufficient traffic in this area to warrant the additional effort in data gathering. If circulation to this group of borrowers from nonadjacent counties and other states becomes more notable—if, for example, it exceeds five percent of the total—then it may become worthwhile to adapt this data gathering process to capture more detailed information on this group of borrowers.

Each library should expect to maintain detailed tallies of circulation by residency for all in-county use during the sample period. The detail of data gathered on the other parts of the form should be determined by local needs for this information. Where substantial crossover traffic with libraries in a nonadjacent county can be anticipated, it may be advantageous to gather more detailed use data on those transactions, and this form could be adapted and expanded to list individual communities in that adjacent county.

Specify the Data Collection Period

If possible, this data should be collected throughout the year so that annual statistics are as accurate as possible. Most likely, only libraries with automated circulation systems will be able to sustain such a data gathering effort year-round. The automated circulation system must be configured to capture and tabulate the desired patron data as transactions occur. In particular, the system must be configured to tally the balance between resident and nonresident circulation, and among nonresident transactions the community of origin for the nonresident borrower.

Other libraries will need to conduct periodic samples of resident and nonresident use. The sample data can then be extrapolated into an estimate of the annual use between resident and nonresident borrowers for aggregation and comparison with the data gathered from other libraries in the county.

For libraries that are not able to keep these statistics on a continuing basis, a sampling period should be determined. These sample periods should be uniform throughout the county and consistent for all libraries engaged in sampling. The exact dates of the sample period should be established by the public library system.

The length of the sample period should strike a balance between the interest in accurate and reliable results (which argues for a longer sampling period) and the interest in minimizing the data gathering burden on staff (which argues for a shorter, less demanding sampling period).

One of two means of structuring the sampling period are usually employed.

• A sample can be taken on specified, random days throughout the year, selected by the system. No fewer than twenty individual days should be identified, and participating libraries should be notified in advance of the days. If the dates are randomly selected, they should, on balance, be representative of seasonal variations in service patterns. Information is collected by the libraries and transmitted immediately to the system (or county coordinator). The system compiles this information for the year and makes annual projections based on the collected data.

• Alternately, data can be collected during specified sample weeks, determined by the

system (or county). At a minimum, two weeks should be selected—one in the spring, the other in the fall. Or it may be appropriate to select more weeks to better reflect seasonal variations—four weeks, for example, could allow libraries to capture data quarterly. A four-season sampling schedule might be appropriate in a county where there are resorts and notable seasonal fluctuations in the population base.

It is essential that the weeks chosen be "typical," or at least that they be perceived as typical. The week between Christmas and New Years, for example, is probably not a representative week for most libraries. Results are compiled by the system (or county) and applied to the entire year. A more thorough discussion of sampling considerations may be found in *Output Measures for Public Libraries* (Van House, et. al., 1987).

Compile, Edit and Audit the Results

System or county coordinators are responsible for assembling the results from the individual libraries. Where annual data is available, it should be used. Where sampling is done, the results should be converted to their annual equivalents to make the data comparable with annual statistics. The results of a two-week sample may be multiplied by 26 in order to translate the sample into an annual result—2,450 transactions in a two-week sample period can suggest an annual circulation rate of 63,700 (2,450 x 26). The data from a four-week sample may be multiplied by 13 to produce a corresponding result.

Sample results should be examined for unexpected findings. Data from a sample may, for example, suggest that the library's annual circulation is substantially lower or higher than is actually the case, which may suggest the need for an alternate way to present the data. The results of a two-week sample of circulation may show that the library completed 2,450 transactions during the sample period. Converting that result into an annual figure suggests that the library should circulate 63,700 items per year (2,450 x 26). But, in fact, over the last five years the subject library has customarily circulated just 50,000 items per year. The result drawn from the sample might suggest that either the library's circulation has taken an unexpected 27 percent increase or the sample happened to be taken during an unusually busy time for the library.

In this case, the library or libraries involved with the nonresident survey may find it a more satisfactory reflection of the real world if the sample is used to determine the relative proportions of use among various population groups. If 250 of the 2,450 sample transactions went to nonresidents, it may be more comfortable for the library to state that roughly 10 percent of its total circulation goes to nonresidents, and that annually its nonresident circulation is 5,000 (10 percent of 50,000 total circulation).

The coordinating unit should also edit and occasionally audit the result to ensure the correct definitions and procedures are in place.

Resources

Van House, Nancy, et al. *Output Measures for Public Libraries: A Manual of Standardized Procedures.* Chicago: American Library Association, 1987.

Appendix B: County Planning Organizations and Resources

State Level Clearinghouse / Planning Commission

Wisconsin Department of Administration
Federal-State Relations
Tom Krauskopf, Officer
P.O. Box 7868
Madison, WI 53707-7868
(608) 266-0267
Serves as state clearinghouse for projects with statewide impact

Regional Planning Commissions

Bay-Lake Regional Planning Commission
Robert L. Fisher, Executive Director
450 Wood Hall
University of Wisconsin—Green Bay
Green Bay, WI 54301-7001
(414)465-2135 / 2143
Serves Door, Florence, Kewaunee, Manitowoc, Marinette, Oconto & Sheboygan Counties

Brown County Planning Commission
B.F. Paruleski, Executive Director
100 North Jefferson Street, Room 608
Green Bay, WI 54301
(414) 436-3633
Serves Brown County

Dane County Regional Planning Commission
Charles Montemayor, Director
City-County Building, Room 523
210 Martin Luther King Blvd.
Madison, WI 53709
(608) 266-4137
Serves Dane County

East Central Wisconsin Regional Planning Commission
Kenneth J. Theine, Executive Director
132 North Main Street
Menasha, WI 54952
(414) 729-4770
Serves Calumet, Fond du Lac, Green Lake, Marquette, Menomonie, Outagamie, Shawano, Waupaca, Waushara & Winnebago Counties

Mississippi River Regional Planning Commission
Greg Flogstad, Director
1707 Main Street, Suite 240
La Crosse, WI 54601
(608) 785-9396
Serves Buffalo, Crawford, Jackson, Monroe, La Crosse, Pepin, Pierce, Trempeleau & Vernon Counties

North Central Wisconsin Regional Planning Commission
Arno Haering, Executive Director
407 Grant Street
Wausau, WI 54403
(715) 845-4208
Serves Forest, Juneau, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas & Wood Counties

Northwest Wisconsin Regional Planning Commission
302 Walnut Street
Spooner, WI 54801
(715) 635-2197
Serves Ashland, Bayfield, Burnett, Douglas, Iron, Price, Rusk, Sawyer, Taylor & Washburn Counties

Rock County Planning Commission
Phil Blaskowski, Director
51 South Main Street
Janesville, WI 53545
(608) 755-2087
Serves Rock County

Southeastern Wisconsin Regional Planning Commission
Kurt W. Bauer, Executive Director
P.O. Box 1607
Waukesha, WI 53187
(414) 547-6721
Serves Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington & Waukesha Counties

Southwestern Wisconsin Regional Planning Commission
Donald Rosenbrook, Director
426 Karmann Library
Platteville, WI 53818
(608) 342-1214
Serves Grant, Green, Iowa, Lafayette & Richland Counties

West Central Wisconsin Regional Planning Commission
Gerald Chasteen, Director
124½ Graham Avenue
Eau Claire, WI 54701
(715) 836-2918
Serves Barron, Chippewa, Clark, Dunn, Eau Claire, Polk & St. Croix Counties

Wisconsin Department of Administration
Federal-State Relations
Tom Krauskopf, Officer
P.O. Box 7868
Madison, WI 53707-7868
(608) 266-0267
Serves Adams, Columbia, Dodge, Jefferson & Sauk Counties (in addition to serving as clearinghouse for projects with statewide impact)

Other State-level Resources

Demographic Services Center
Division of Energy & Intergovernmental Relations
Department of Administration
101 East Wilson Street
P.O. Box 7868
Madison, WI 53707
(608) 266-1927

Bureau of Local Financial Assistance
Division of State and Local Finance
Department of Revenue
125 South Webster Street
P.O. Box 8933
Madison, WI 53708
(608) 266-8233

Applied Population Lab
University of Wisconsin—Madison
316 Agriculture Hall
Madison, WI 53706
(608) 262-1515

Library Evaluation and Development Center
(LEAD)
School of Library and Information Studies
University of Wisconsin—Madison
4287 Helen C. White Hall
600 North Park Street
Madison, WI 53706
(608) 263-2900

Appendix C: Tabulation of 1993 County Level Service Data

The following pages include tallies of cumulative county statistical data drawn from the latest *Service Record*. Planners can use this data to make broad comparisons among peer counties. Column headings are defined as in the *Service Record*. Additional background information on the content of this data can be found there. Further updates of this information appear in subsequent editions of the *Service Record*.

COUNTY	****** POPULATION ******			**** REGIS BORROWERS ****			****** CIRCULATION ******		
	Municipal	Service	Total	Resident	Nonres	Total	Adult	Juvenile	Total
Adams	16,608	0	16,608	5,528	66	5,594	36,124	12,925	49,049
Ashland	9,824	6,602	16,426	6,498	4,298	10,798	118,780	61,610	180,390
Barron	17,475	24,053	41,528	1,268	1,861	24,875	212,710	135,251	347,961
Bayfield	4,238	10,007	14,245	3,141	4,069	12,379	30,408	27,955	58,363
Brown	204,305	0	204,305	1,856	64	1,921	1,024,011	724,978	1,748,989
Buffalo	3,422	10,307	13,729	1,499	24,999	3,999	20,085	22,268	42,353
Burnett	1,849	11,614	13,463	763	2,173	2,936	20,860	8,160	29,020
Calumet	9,446	15,741	25,187	5,557	6,802	12,359	81,540	81,568	246,079
Chippewa	20,993	30,467	51,460	13,628	14,210	30,044	226,263	175,211	401,474
Clark	12,650	20,040	32,690	5,546	4,412	12,029	147,729	128,347	276,076
Columbia	22,847	23,199	46,046	14,260	12,437	28,950	228,853	162,171	391,024
Crawford	6,873	9,090	15,963	229	384	614	30,122	24,672	54,794
Dane	285,480	98,135	383,615	215,787	4,294	46,684	3,294,742	1,122,979	4,417,721
Dodge	36,527	29,156	65,683	18,615	10,003	32,378	343,359	217,096	560,543
Door	26,007	0	26,007			18,355	187,272	111,279	298,551
Douglas	27,365	14,860	42,225	9,873	4,195	14,068	178,351	32,905	211,256
Dunn	16,270	20,188	36,458	8,445	8,993	17,438	164,484	161,782	326,266
Eau Claire	67,693	20,942	88,635	24,348	11,613	35,962	522,493	376,150	898,644
Florence	4,804	0	4,804	1,205	0	1,205	6,005		7,730
Fond du Lac	63,829	34,775	98,604	18,292	11,581	38,594	410,116	320,216	730,332
Forest	4,428	4,514	8,942	694	6	3,678	29,833	14,389	44,222
Grant	26,987	22,773	49,760	13,907	4,551	19,725	187,062	150,868	298,260
Green	22,499	8,093	30,592	14,558	4,720	19,278	276,019	125,029	401,068
Green Lake	11,673	7,337	19,010	5,741	4,819	9,550	120,205	81,183	201,388
Iowa	7,724	12,667	20,391	4,122	2,676	6,798	56,033	56,476	112,509
Iron	3,973	2,238	6,211	2,222	464	2,686	17,515	13,488	31,003
Jackson	3,582	13,312	16,894	1,329	2,050	3,379	35,008	11,629	46,637
Jefferson	59,513	27,506	87,019	27,803	13,996	41,799	466,705	314,484	781,189
Juneau	8,149	14,163	22,312	4,451	3,813	8,264	91,276	95,236	186,512
Kenosha	102,546	30,860	133,406	53,644	12,752	66,396	53,539	31,734	960,858
Kewaunee	6,147	12,931	19,078	4,113	4,582	8,695	102,204	51,102	153,306
La Crosse	100,383	0	100,383	57,330	68,871	126,201	682,161	420,773	1,102,934
Lafayette	6,908	9,265	16,173	724	550	1,276	39,680	32,909	72,589
Langlade	8,529	11,497	20,026	8,725	908	9,633	95,585	50,682	146,267
Lincoln	13,586	14,065	27,651	8,760	7,959	16,719	233,825	152,798	386,623
Manitowoc	49,508	32,773	82,281	28,533	15,331	43,864	524,027	372,809	896,836
Marathon	118,107	0	118,107	16,954	948	17,902			619,854
Marinette	41,138	0	41,138	15,426	322	15,426	234,923	105,096	340,019
Marquette	4,940	7,810	12,750	2,162	2,929	5,091	39,478	44,025	83,503
Menominee	4,062	0	4,062	1,051	6	1,057	1,260	624	1,884

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Volumes added	Titles added	Volumes owned	Audio material	Films	Video material	Other material	Periodical subscr	Subscr titles	COUNTY
			•••••••• COLLECTIONS & RESOURCES ••••••••						
1,282	1,275	17,195	42	0	412	1,728	78	78	Adams
5,371	4,931	62,053	2,100	0	1,401	137	292	291	Ashland
8,056	7,462	157,096	6,028	20	769	707	436	436	Barron
4,921	4,636	42,809	575	0	867	143	135	135	Bayfield
49,127	10,561	382,493	4,034	42	800	520	1,373	811	Brown
3,758	2,250	35,231	890	1	160	596	305	305	Buffalo
906	814	15,148	132	0	138	95	63	63	Burnett
5,021	4,671	86,645	3,627	22	1,906	796	373	373	Calumet
12,237	9,172	144,957	6,806	287	1,078	9,836	479	477	Chippewa
7,942	7,367	139,275	4,522	108	2,125	593	535	529	Clark
12,189	8,093	138,848	3,446	6	1,877	1,128	605	604	Columbia
1,812	1,700	73,054	1,472	0	73	1,640	129	129	Crawford
104,218	43,126	1,202,247	61,151	235	25,707	5,990	3,921	2,778	Dane
17,778	12,991	257,162	7,184	97	5,601	1,367	980	885	Dodge
6,549	3,843	154,919	1,747	78	1,361	539	385	230	Door
3,581	-	121,761	3,646	8	1,555	102,033	176	176	Douglas
8,045	7,762	76,977	2,018	31	2,647	115	276	272	Dunn
21,893	4,787	287,846	12,660	0	4,785	4,449	799	769	Eau Claire
674	662	6,057	383	0	433	1	6	6	Florence
17,577	4,657	440,372	12,437	13	4,289	339,822	911	873	Fond du Lac
1,459	1,304	31,678	177	36	701	840	234	176	Forest
9,566	8,114	192,663	3,377	37	1,225	1,591	520	520	Grant
11,124	10,515	113,941	6,024	1	4,154	295	416	416	Green
5,925	5,379	66,746	2,261		2,946	324	261	261	Green Lake
1,978	1,910	33,742	1,225	0	350	1,090	133	133	Iowa
1,322	1,269	17,566	70	0	318	44	56	56	Iron
1,815	1,753	19,792	79	0	18	0	61	61	Jackson
14,418	12,785	287,417	9,261	106	4,294	17,600	1,178	1,168	Jefferson
4,684	3,670	92,745	2,688	27	1,114	2,046	213	290	Juneau
27,528	14,470	267,064	13,192	486	3,743	264	1,737	965	Kenosha
3,573	3,221	60,101	2,591	17	1,794	324	302	276	Kewaunee
35,766	6,864	333,042	21,350	75	4,997	82,924	1,445	779	La Crosse
2,222	2,000	58,855	1,576	31	1,161	2,062	176	176	Lafayette
3,202	2,841	72,866	858	48	373	535	174	173	Langlade
7,159	52,457	125,398	2,909	5	2,021	1,388	387	180	Lincoln
18,509	14,230	247,141	5,986	494	5,502	2,396	649	619	Manitowoc
11,572	5,059	252,733	11,037	0	1,890	112,549	846	530	Marathon
7,194	3,399	194,481	3,198	117	1,066	788	550	321	Marinette
5,135	5,654	45,852	512		1,866	93	194	190	Marquette
902	694	9,902	37		156	0	28	28	Menominee

COUNTY	******** STAFFING ********					******** SERVICES ********				
	ALA MLS	Other degree	Other libn	Other staff	Total	Ref transac	Attendnc	In-library use	ILL loaned	ILL received
Adams	0.9	0.0	0.0	2.4	3.4	2,620	35,000	10,000	216	1,865
Ashland	1.0	0.0	3.4	4.2	8.6	3,335	116,343	810	1,490	3,262
Barron	1.9	0.0	14.2	0.3	16.3	13,542	232,755	10,046	2,329	3,788
Bayfield	0.0	0.0	2.5	1.5	4.0	2,298	37,201	588	764	1,223
Brown	10.5	0.9	20.7	63.9	96.0	187,300	1,201,723	1,297,723	12,315	8,516
Buffalo	0.5	0.8	0.0	0.3	1.6	10,500	18,000	34,000	81	1,002
Burnett	0.0	0.0	1.1	0.7	1.8	1,339	30,306	58	142	685
Calumet	1.0	0.0	5.9	3.0	9.9	19,194	190,348		590	6,926
Chippewa	2.5	0.0	27.7	8.9	39.1	14,991	231,493		2,180	4,726
Clark	0.0	0.8	9.6	1.0	11.4	15,721	92,956	34,224	825	4,295
Columbia	1.0	0.7	15.1	6.0	22.7	37,088	376,664	173,362	7,536	19,548
Crawford	0.0	0.0	4.3	0.0	4.3	3,276	7,452		305	1,048
Dane	57.3	2.2	25.5	124.4	209.4	306,228	1,047,216	132,901	125,240	142,755
Dodge	4.0	0.6	9.4	16.4	30.4	23,818	313,760	73,809	5,229	7,572
Door	3.9	0.0	7.5	8.3	19.7	23,909	223,837	-	762	2,800
Douglas	4.5	0.8	2.8	10.3	18.3	19,364	175,041		2,253	918
Dunn	0.9	0.0	6.0	4.2	11.2	10,950	154,949	3,063	798	2,754
Eau Claire	6.9	0.0	4.9	33.4	45.2	92,732	517,732	1,046	15,112	3,055
Florence	0.0	0.0	0.8	0.2	1.0	1,000	5,000	-	112	715
Fond du Lac	11.5	1.0	5.3	32.9	50.7	38,927	304,239	1,786	7,552	5,376
Forest	0.0	0.0	2.3	0.0	2.3	1,732	27,740		147	508
Grant	2.0	0.0	13.8	4.0	19.8	14,614	84,208	1,825	1,934	5,483
Green	2.0	0.0	9.2	4.7	15.8	5,064	213,682		10,994	16,095
Green Lake	0.9	0.0	7.4	1.6	9.9	8,992	168,800		289	3,288
Iowa	1.0	0.3	2.0	3.2	6.6	16,913	46,629	79,083	197	1,731
Iron	0.0	0.0	2.4	0.1	2.5	1,995	9,079	4,085	21	337
Jackson	0.0	0.0	1.0	1.7	2.7	6,500	22,000		144	525
Jefferson	12.4	0.0	12.6	29.1	54.1	61,465	562,902	40,494	4,547	6,955
Juneau	0.0	0.0	5.3	2.5	7.7	13,948	70,593	6,068	620	3,605
Kenosha	21.9	2.5	1.0	56.2	81.6	113,554	668,238		3,287	6,395
Kewaunee	1.0	0.0	6.7	0.5	8.2	9,476	101,026	14,162	400	2,979
La Crosse	9.9	3.7	20.6	44.2	78.4	104,680	749,104		17,202	3,246
Lafayette	0.0	0.0	4.1	0.3	4.4	3,104	44,033	137	408	1,398
Langlade	1.0	0.0	0.9	9.0	10.9	-	-		112	1,455
Lincoln	0.0	1.0	4.9	12.0	17.9	13,736	50,574		1,167	2,038
Manitowoc	11.0	0.0	1.8	37.2	50.0	95,531	498,501	13,585	9,234	4,520
Marathon	10.5	0.0	1.0	47.8	59.3	77,944	237,506	12,990	8,942	6,149
Marinette	1.8	0.0	3.9	8.0	13.7	16,658	203,982	-	711	7,413
Marquette	0.0	0.0	4.5	0.6	5.1	7,113	49,655		90	3,021
Menominee	0.0	0.0	3.1	0.5	1.8	300	2,934		7	60

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******** PROGRAMMING ********				******** TAX RATES ********						COUNTY
Adult progr	Adult attend	Juvenile progr	Juvenile attend	Per $1,000 average	Per cap average	Per $1,000 non-res	Per cap nonres	Per $1,000 resident	Per cap resident	
2	500	4	423	0.176	$7.21	0.176	$7.21	0.176	$7.21	Adams
25	513	132	4,384	0.951	$19.39	0.086	$1.46	1.302	$29.48	Ashland
6	206	140	3,812	0.490	$12.14	0.077	$2.08	1.134	$24.34	Barron
32	1,748	116	1,699	0.260	$9.22	0.076	$2.71	0.629	$21.95	Bayfield
216	12,958	2,934	133,751	0.719	$20.78	0.719	$20.78	0.719	$20.78	Brown
0	0	51	752	0.211	$5.12	0.045	$1.17	0.865	$16.18	Buffalo
3	69	19	508	0.131	$5.18	0.064	$2.77	1.066	$19.16	Burnett
24	981	239	7,661	0.471	$13.16	0.108	$3.10	1.126	$29.92	Calumet
2	80	553	12,636	0.647	$15.13	0.270	$6.66	1.271	$27.43	Chippewa
5	534	275	5,463	0.502	$10.11	0.087	$1.91	1.258	$22.04	Clark
25	764	512	13,555	0.501	$15.58	0.136	$5.04	1.051	$26.29	Columbia
3	320	13	771	0.391	$9.15	0.085	$2.13	0.797	$16.72	Crawford
110	3,435	1,765	68,268	0.632	$22.17	0.440	$16.97	0.707	$23.95	Dane
16	1,084	300	8,982	0.590	$15.84	0.258	$8.07	0.946	$22.05	Dodge
19	109	335	8,021	0.402	$27.68	0.402	$27.68	0.402	$27.68	Door
11	280	153	2,352	0.813	$17.69	0.093	$2.16	1.243	$26.13	Douglas
20	711	229	6,536	0.458	$9.58	0.245	$5.75	0.772	$13.70	Dunn
95	3,085	361	12,949	0.851	$20.00	0.456	$13.29	0.961	$20.93	Eau Claire
0	0	6	700	0.228	$7.46	0.228	$7.46	0.228	$7.46	Florence
53	1,952	436	17,614	0.779	$20.32	0.303	$9.52	1.130	$26.21	Fond du Lac
	-	14	415	0.188	$5.31	0.019	$0.71	0.554	$9.99	Forest
1	83	225	5,855	0.657	$14.26	0.119	$3.31	1.402	$23.20	Grant
13	371	180	6,347	0.624	$18.47	0.301	$10.53	0.772	$21.32	Green
17	505	163	4,709	0.453	$16.49	0.161	$7.59	0.582	$17.28	Green Lake
95	405	182	5,012	0.359	$11.92	0.080	$2.85	0.914	$26.80	Iowa
0	0	21	432	0.294	$8.66	0.059	$2.06	0.406	$10.81	Iron
0	0	42	1,393	0.219	$5.47	0.047	$1.17	0.833	$20.31	Jackson
46	990	798	20,426	0.779	$19.51	0.320	$10.22	1.089	$23.81	Jefferson
0	0	134	4,595	0.399	$10.34	0.036	$1.07	1.366	$25.77	Juneau
25	510	283	15,426	0.632	$21.55	0.302	$13.57	0.775	$23.95	Kenosha
23	651	286	5,856	0.515	$12.98	0.159	$4.29	1.455	$31.25	Kewaunee
36	933	943	33,885	1.186	$29.06	0.578	$14.03	1.186	$29.06	La Crosse
8	156	114	4,056	0.286	$8.37	0.076	$2.99	0.971	$15.42	Lafayette
5	193	90	2,230	0.648	$15.63	0.459	$13.70	1.111	$18.23	Langlade
2	23	270	9,069	1.103	$25.78	0.754	$20.56	1.610	$31.18	Lincoln
241	1,707	691	20,335	0.864	$21.07	0.479	$12.13	1.136	$26.98	Manitowoc
0	0	907	27,821	0.750	$19.79	0.750	$19.79	0.750	$19.79	Marathon
40	1,341	376	8,051	0.474	$12.76	0.474	$12.76	0.474	$12.76	Marinette
0	14	66	1,657	0.297	$10.41	0.160	$6.71	0.675	$16.27	Marquette
3	60	2	1,090	1.642	$29.25	1.642	$29.25	1.642	$29.25	Menominee

COUNTY	******** LIBRARY INCOME (in $1,000s) ********									
	City approp	Village approp	Town approp	Total approp	County funding	State aid	Federal aid	Contract income	All other income	Total income
Adams	$0	$0	$0	$0	$120	$6	$0	$0	$0	$126
Ashland	$265	$0	$25	$290	$29	$8	$14	$0	$41	$381
Barron	$405	$20	$0	$425	$79	$3	$0	$0	$126	$633
Bayfield	$75	$0	$18	$93	$38	$6	$9	$0	$35	$181
Brown	$172	$0	$0	$172	$4,073	$157	$34	$11	$266	$4,713
Buffalo	$55	$0	$0	$55	$15	$0	$0	$0	$3	$73
Burnett	$0	$35	$0	$35	$34	$4	$2	$0	$23	$100
Calumet	$283	$0	$0	$283	$49	$0	$3	$0	$26	$360
Chippewa	$545	$31	$0	$576	$203	$3	$0	$0	$31	$813
Clark	$249	$30	$0	$279	$52	$19	$8	$0	$72	$429
	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Columbia	$518	$83	$0	$601	$117	$14	$9	$0	$94	$835
Crawford	$103	$12	$0	$115	$31	$0	$0	$0	$10	$156
Dane	$6,036	$802	$0	$6,838	$1,665	$238	$142	$85	$893	$9,861
Dodge	$661	$123	$22	$805	$235	$25	$9	$0	$25	$1,100
Door	$39	$0	$0	$39	$681	$13	$0	$0	$5	$737
Douglas	$715	$0	$0	$715	$32	$10	$1	$0	$7	$765
Dunn	$182	$35	$6	$223	$126	$1	$25	$0	$17	$392
Eau Claire	$1,403	$13	$1	$1,417	$356	$109	$1	$0	$185	$2,068
Florence	$0	$0	$0	$0	$36	$1	$0	$0	$1	$38
Fond du Lac	$1,558	$114	$0	$1,673	$331	$103	$9	$6	$136	$2,258
	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Forest	$15	$0	$29	$44	$3	$3	$0	$0	$1	$52
Grant	$559	$67	$0	$626	$83	$0	$0	$0	$15	$724
Green	$378	$93	$8	$480	$85	$14	$1	$7	$33	$619
Green Lake	$183	$19	$0	$202	$112	$0	$0	$20	$50	$383
Iowa	$184	$23	$0	$207	$36	$0	$0	$0	$20	$263
Iron	$31	$0	$12	$43	$11	$2	$2	$0	$7	$65
Jackson	$73	$0	$0	$73	$20	$0	$5	$0	$1	$99
Jefferson	$1,342	$75	$0	$1,417	$281	$38	$0	$46	$265	$2,047
Juneau	$186	$24	$0	$210	$21	$0	$0	$0	$39	$270
Kenosha	$2,239	$97	$120	$2,456	$415	$229	$0	$0	$203	$3,303
	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Kewaunee	$192	$0	$0	$192	$56	$10	$0	$0	$23	$280
La Crosse	$2,234	$19	$3	$2,255	$662	$241	$1	$0	$299	$3,459
Lafayette	$70	$37	$0	$107	$29	$0	$0	$0	$28	$163
Langlade	$155	$0	$0	$155	$158	$8	$0	$0	$10	$331
Lincoln	$424	$0	$0	$424	$289	$4	$0	$0	$75	$792
Manitowoc	$1,336	$0	$0	$1,336	$398	$27	$10	$2	$119	$1,891
Marathon	$0	$0	$0	$0	$2,337	$95	$8	$0	$229	$2,669
Marinette	$0	$0	$0	$0	$525	$21	$0	$0	$32	$579
Marquette	$27	$44	$9	$80	$52	$0	$15	$5	$13	$167
Menominee	$0	$109	$0	$109	$109	$2	$4	$0	$10	$135

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••••••••• LIBRARY EXPENDITURES (in $1,000s) •••••••••						•••••• CAPITAL EXPENDITURES (in $1,000s) ••••••				
Salaries & wages	Benefits	Library material	Contract services	Other expend	Total op expend	Federal income	State income	Local income	Other income	Total expend
$76	$26	$13	$2	$0	$117	$0	$0	$0	$0	$0
$151	$51	$70	$19	$75	$366	$0	$0	$0	$1	$1
$276	$91	$91	$0	$88	$546	$0	$0	$16	$2	$19
$64	$13	$34	$26	$31	$167	$0	$0	$0	$0	$0
$2,230	$791	$592	$0	$964	$4,578	$0	$0	$0	$113	$113
$29	$6	$19	$15	$3	$71	$0	$0	$4	$0	$4
$24	$2	$8	$24	$14	$73	$0	$0	$0	$0	$0
$152	$56	$59	$0	$82	$350	$0	$0	$10	$0	$10
$411	$123	$139	$0	$92	$764	$0	$0	$4	$5	$9
$165	$37	$79	$3	$87	$370	$0	$0	$7	$12	$19
$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
$378	$90	$160	$14	$136	$779	$1	$0	$92	$38	$132
$74	$38	$28	$35	$10	$184	$0	$0	$0	$0	$0
$5,049	$1,324	$1,290	$271	$1,380	$9,313	$164	$0	$1,225	$215	$1,604
$484	$134	$220	$34	$163	$1,035	$0	$10	$4	$10	$25
$369	$142	$98	$0	$98	$708	$0	$2	$40	$8	$50
$414	$117	$61	$37	$125	$754	$0	$0	$0	$0	$0
$181	$49	$84	$0	$75	$388	$0	$0	$3	$0	$4
$954	$293	$316	$0	$440	$2,004	$0	$15	$67	$9	$90
$16	$3	$9	$2	$6	$36	$0	$2	$2	$1	$5
$1,133	$358	$283	$22	$288	$2,083	$4	$32	$34	$27	$97
$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
$31	$5	$9	$1	$5	$51	$0	$1	$2	$0	$3
$344	$117	$112	$95	$68	$736	$0	$0	$2	$2	$3
$276	$75	$147	$15	$87	$599	$0	$0	$67	$9	$77
$132	$45	$63	$45	$85	$370	$4	$0	$14	$0	$18
$118	$42	$19	$38	$32	$250	$0	$0	$3	$0	$3
$27	$4	$14	$11	$4	$60	$0	$0	$0	$0	$0
$40	$11	$18	$20	$11	$99	$0	$0	$0	$0	$0
$984	$273	$272	$35	$246	$1,810	$0	$53	$30	$159	$242
$121	$24	$47	$21	$33	$245	$0	$0	$8	$0	$8
$1,670	$576	$439	$0	$512	$3,198	$109	$15	$973	$38	$1,135
$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
$140	$40	$54	$0	$34	$268	$0	$0	$3	$0	$3
$1,701	$567	$413	$30	$607	$3,317	$0	$0	$226	$0	$226
$53	$11	$21	$31	$22	$138	$0	$0	$0	$1	$1
$186	$52	$44	$2	$26	$311	$0	$0	$28	$21	$48
$367	$127	$112	$3	$103	$713	$0	$20	$23	$58	$101
$877	$317	$265	$51	$250	$1,760	$2	$0	$4	$0	$6
$1,256	$404	$174	$3	$375	$2,212	$0	$0	$100	$0	$100
$269	$91	$86	$0	$127	$573	$0	$0	$0	$0	$0
$69	$9	$46	$11	$28	$164	$0	$0	$3	$1	$4
$48	$21	$17	$7	$39	$131	$0	$0	$0	$4	$4

COUNTY	****** POPULATION ******			**** REGIS BORROWERS ****			****** CIRCULATION ******		
	Municipal	Service	Total	Resident	Nonres	Total	Adult	Juvenile	Total
Milwaukee	963,712	4,215	967,927	590,958	4,066	574,412	4,427,631	2,568,322	6,821,453
Monroe	17,643	19,948	37,591	15,577	6,246	21,824	176,694	146,131	322,825
Oconto	12,456	18,653	31,109	7,178	6,843	52,021	94,768	78,841	173,610
Oneida	23,244	9,418	32,662	13,630	4,280	17,911	169,899	129,639	338,275
Outagamie	92,563	61,213	153,776	43,982	36,207	80,189	795,153	601,722	1,396,875
Ozaukee	66,094	9,327	75,421	6,323	2,031	19,663	417,510	377,143	794,483
Pepin	2,874	4,282	7,156	198	83	675	24,656	19,432	44,088
Pierce	19,279	15,863	35,142	13,375	6,566	19,942	135,713	161,031	313,334
Polk	12,818	22,720	35,538	5,514	9,298	16,816	158,359	130,141	307,811
Portage	63,263	0	63,253	24,906	1,441	26,347	10,205	7,961	490,646
Price	5,614	10,147	15,751	5,876	6,603	12,479	68,069	47,002	115,071
Racine	103,959	76,085	180,044	47,507	39,164	86,671	524,211	505,593	1,254,120
Richland	6,199	11,488	17,887	3,940	5,092	9,032	54,607	8,113	111,820
Rock	104,891	37,091	141,982	68,123	28,111	96,374	777,071	374,106	1,535,180
Rusk	7,453	7,736	15,189	7,003	487	7,491	57,940	35,800	93,739
Sauk	25,236	23,399	48,635	12,722	14,461	27,186	286,193	232,813	519,006
Sawyer	4,896	9,591	14,487	3,826	2,686	6,502	60,903	29,134	90,037
Shawano	37,548	0	37,548	12,509	750	13,259	195,832	93,007	288,839
Sheboygan	74,837	31,094	105,981	45,591	36,618	82,210	693,922	431,417	1,125,339
St. Croix	19,807	30,434	50,241	9,653	12,944	23,392	157,994	138,225	343,430
Taylor	6,841	12,225	19,066	3,730	3,878	7,608	72,554	60,921	133,475
Trempealeau	10,913	14,646	25,559	3,115	2,575	6,360	88,924	77,223	166,147
Vernon	9,172	16,717	25,889	2,819	4,196	7,016	89,787	51,476	144,170
Vilas	14,729	3,421	18,150	2,484	6,397	9,043	128,811	67,841	196,652
Walworth	30,533	37,083	67,616	17,530	18,327	35,858	236,084	100,260	464,744
Washburn	3,743	10,393	14,116	959	1,439	4,155	48,060	31,877	79,937
Washington	55,491	47,060	102,551	19,264	14,935	34,199	439,075	320,316	759,391
Waukesha	243,813	75,022	318,815	130,965	74,831	205,700	1,728,775	1,404,214	3,268,936
Waupaca	22,812	26,040	48,852	7,578	9,274	28,354	224,407	204,565	429,040
Waushara	9,019	10,629	19,648	3,779	5,098	8,877	115,133	70,323	185,456
Winnebago	100,455	43,519	143,974	30,389	49,428	60,015	1,065,416	861,416	1,926,832
Wood	42,649	32,912	75,561	20,913	24,032	44,945	577,902	298,288	876,190

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******** COLLECTIONS & RESOURCES ********									COUNTY
Volumes added	Titles added	Volumes owned	Audio material	Films	Video material	Other material	Periodical subscr	Subscr titles	
177,812	86,067	3,398,834	78,737	0	30,430	375,302	2,111	14,642	Milwaukee
13,306	11,932	107,193	3,594	25	1,333	2,160	372	372	Monroe
6,287	5,884	82,270	1,835	76	2,224	92	309	308	Oconto
8,255	5,055	166,352	3,025	92	1,321	3,388	323	321	Oneida
21,777	15,261	385,435	16,178	264	5,133	7,133	1,294	1,133	Outagamie
15,135	13,436	294,719	5,464	59	5,222	12,144	858	851	Ozaukee
3,298	3,190	54,697	1,532	58	676	261	117	117	Pepin
14,695	11,858	123,926	2,367	98	2,742	55	343	343	Pierce
13,198	10,303	157,942	2,931	17	911	1,747	328	328	Polk
5,965	5,141	139,840	7,753	0	1,695	2,002	436	372	Portage
6,189	4,630	76,701	1,037		944	265	240	226	Price
32,097	17,694	422,978	14,489	750	3,670	245,552	1,291	1,120	Racine
1,834	1,621	72,526	2,422	94	256	4,070	82	82	Richland
37,068	33,611	430,863	26,964	52	7,286	917	1,431	1,341	Rock
1,873	1,728	44,913	842	0	519	267	143	143	Rusk
11,352	10,425	186,625	5,610	112	2,464	2,729	697	694	Sauk
2,971	2,696	39,705	907	16	833	94	180	180	Sawyer
4,139	3,702	104,304	6,140	212	1,684	27,376	530	515	Shawano
26,607	26,199	429,738	12,270	0	7,482	131,981	1,122	1,073	Sheboygan
12,499	9,989	190,080	4,038	345	3,408	421	443	442	St. Croix
4,237	3,937	56,425	922	22	607	638	266	266	Taylor
6,118	4,172	76,508	944	8	852	1,484	354	354	Trempealeau
10,667	10,268	114,689	823	0	345	289	1,066	392	Vernon
9,794	9,168	102,326	1,793	69	2,922	495	281	279	Vilas
12,012	10,854	184,992	10,007	262	3,634	585	901	901	Walworth
2,375	2,267	37,683	604	0	252	112	78	78	Washburn
19,284	15,220	238,031	7,867	0	3,520	903	749	748	Washington
80,068	52,292	963,032	35,203	241	16,424	11,381	3,397	3,371	Waukesha
11,977	9,484	173,478	3,487	30	3,167	883	718	718	Waupaca
7,210	6,806	55,773	774	0	4,323	10,604	244	244	Waushara
40,461	2,081	529,003	31,798	0	11,372	2,168	1,494	1,302	Winnebago
21,477	14,719	267,123	6,906	73	5,248	16,696	916	913	Wood

COUNTY	******** STAFFING ********					******** SERVICES ********				
	ALA MLS	Other degree	Other libn	Other staff	Total	Ref Transac	Attendnc	In-library use	ILL loaned	ILL received
Milwaukee	163.2	2.0	6.4	383.1	554.7	2,228,703	2,238,162	2,773,143	119,627	101,362
Monroe	2.0	0.0	6.9	3.5	12.4	18,506	268,964	15,254	703	2,793
Oconto	0.0	0.0	5.8	2.8	8.6	18,135	92,534	270	509	10,331
Oneida	2.0	0.0	8.4	10.6	21.0	26,473	159,773	7,247	822	2,915
Outagamie	15.0	3.0	4.6	40.8	63.4	271,763	681,898		16,534	8,027
Ozaukee	9.1	1.0	8.2	20.2	38.5	75,557	625,602		4,491	5,532
Pepin	0.0	0.0	1.5	0.3	1.8	3,237	18,078	2,260	326	570
Pierce	1.1	0.0	6.8	4.6	12.4	22,710	175,949	9,500	2,260	2,919
Polk	1.0	0.0	10.2	0.5	11.6	15,069	96,519	17,970	4,614	14,448
Portage	5.5	0.0	3.3	21.1	29.9	35,850	295,458	36,949	992	2,227
Price	1.2	1.0	4.9	1.8	8.8	9,596	27,646	7,029	362	4,731
Racine	19.0	2.8	3.3	47.6	72.7	149,960	631,966	319,081	10,155	6,646
Richland	1.0	0.0	1.3	4.0	6.3	7,009	123,648	37,998	908	2,216
Rock	20.8	0.0	7.9	63.3	92.0	209,217	889,640	5,680	10,333	10,901
Rusk	0.0	0.0	4.9	0.0	4.9	3,490	50,849	2,154	216	588
Sauk	2.9	0.9	9.1	10.2	23.0	18,376	269,604	66,688	14,432	21,157
Sawyer	1.0	0.0	3.5	1.7	6.2	5,473	50,063	3,498	653	2,749
Shawano	0.9	0.0	6.5	6.0	13.4	17,409	165,000	46,000	928	1,811
Sheboygan	16.0	0.0	10.6	53.1	79.7	117,750	1,109,688	235,011	6,329	7,180
St. Croix	3.0	0.0	15.3	3.1	21.4	19,681	160,256	13,738	3,981	4,913
Taylor	0.0	0.0	5.2	0.4	5.5	7,399	54,860	296	287	2,664
Trempealeau	0.0	0.0	6.2	1.3	7.5	8,047	34,497	10,440	832	3,891
Vernon	0.0	0.0	4.8	3.1	7.9	15,506	95,448	56,995	458	3,980
Vilas	0.0	0.0	5.9	3.8	9.7	21,138	146,594	15,071	1,701	3,647
Walworth	4.0	0.9	12.2	17.4	34.5	76,013	456,433		4,220	8,049
Washburn	0.0	0.0	1.4	2.7	4.0	6,704	42,279	9,114	350	1,834
Washington	6.5	1.0	10.1	22.0	39.5	18,539	288,393	49,996	2,701	4,526
Waukesha	49.3	0.0	18.7	102.4	170.4	283,563	1,787,304	395,891	19,890	21,163
Waupaca	3.0	2.5	10.5	13.2	29.1	12,924	193,989	1,994	3,641	6,019
Waushara	0.0	0.0	6.1	0.2	6.3	14,547	85,944		180	2,906
Winnebago	23.7	0.6	5.4	55.3	85.1	113,353	764,311	896	13,657	14,351
Wood	10.0	0.1	3.5	31.1	44.7	84,202	500,549	37,377	2,905	5,776

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******** PROGRAMMING ********				******** TAX RATES ********						COUNTY
Adult progr	Adult attend	Juvenile progr	Juvenile attend	Per $1,000 average	Per cap average	Per $1,000 income	Per cap income	Per $1,000 resident	Per cap resident	
1,150	21,051	4,845	161,457	0.886	$24.41	0.382	$14.68	0.889	$24.45	Milwaukee
31	763	379	9,680	0.546	$12.28	0.043	$1.01	1.113	$24.10	Monroe
14	215	163	3,143	0.259	$7.37	0.295	$6.15	0.211	$9.20	Oconto
29	1,302	288	7,564	0.451	$20.63	0.164	$17.11	0.501	$21.97	Oneida
114	3,078	1,027	27,877	0.651	$20.18	0.115	$10.87	0.917	$26.34	Outagamie
63	471	285	7,831	0.399	$19.64	0.290	$10.70	0.410	$20.90	Ozaukee
		10	481	0.454	$10.37	0.211	$5.74	0.814	$13.69	Pepin
25	336	334	8,125	0.512	$13.22	0.185	$5.87	0.923	$19.28	Pierce
12	215	183	5,494	0.377	$11.36	0.103	$3.54	1.037	$22.90	Polk
17	380	651	17,447	0.529	$14.96	0.529	$14.96	0.529	$14.96	Portage
5	799	74	2,310	0.657	$16.14	0.287	$7.49	1.458	$31.79	Price
1	4	531	22,895	0.465	$14.65	0.160	$6.59	0.842	$20.55	Racine
	-	116	2,867	0.590	$12.69	0.133	$3.07	1.470	$27.48	Richland
98	2,399	530	24,209	0.958	$24.67	0.367	$11.39	1.230	$29.36	Rock
8	144	95	2,723	0.522	$10.23	0.369	$8.30	0.584	$9.71	Rusk
69	1,029	691	12,444	0.509	$15.99	0.142	$5.65	1.084	$25.58	Sauk
14	209	35	864	0.207	$9.11	0.054	$2.97	0.890	$19.99	Sawyer
198	4,312	190	8,930	0.436	$11.10	0.436	$11.10	0.436	$11.10	Shawano
147	4,883	777	25,380	1.075	$30.31	0.501	$16.20	1.366	$36.17	Sheboygan
40	321	463	10,611	0.428	$14.48	0.181	$6.45	0.865	$26.81	St. Croix
6	126	123	2,439	0.360	$7.55	0.145	$2.83	0.682	$15.97	Taylor
15	333	151	3,974	0.463	$9.71	0.047	$1.10	1.130	$20.45	Trempealeau
10	641	68	2,109	0.385	$8.49	0.067	$1.66	1.156	$19.79	Vernon
97	1,801	418	7,632	0.181	$13.41	0.028	$1.11	0.174	$13.98	Vilas
21	852	565	16,496	0.249	$15.12	0.120	$8.25	0.463	$23.46	Walworth
6	126	70	1,361	0.211	$7.08	0.056	$2.05	0.776	$19.63	Washburn
16	945	304	12,630	0.380	$14.11	0.154	$6.45	0.622	$20.63	Washington
216	3,788	1,318	55,253	0.457	$22.64	0.291	$15.73	0.514	$24.77	Waukesha
14	289	512	12,501	0.671	$18.29	0.292	$9.07	1.249	$28.89	Waupaca
9	233	231	3,428	0.286	$10.75	0.162	$7.80	0.400	$10.11	Waushara
21	421	669	19,552	0.780	$24.41	0.572	$21.90	0.902	$25.49	Winnebago
8	472	338	9,958	0.840	$21.97	0.333	$8.86	1.245	$32.08	Wood

COUNTY	******** LIBRARY INCOME (in $1,000s) ********									
	City approp	Village approp	Town approp	Total approp	County funding	State aid	Federal aid	Contract income	All other income	Total income
	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Milwaukee	$21,825	$1,738	$0	$23,563	$62	$1,814	$105	$61	$930	$26,473
Monroe	$402	$23	$0	$425	$36	$0	$7	$0	$35	$504
Oconto	$86	$9	$20	$115	$115	$17	$0	$0	$52	$298
Oneida	$135	$0	$376	$511	$163	$13	$0	$0	$63	$750
Outagamie	$2,217	$221	$0	$2,438	$665	$9	$2	$20	$59	$3,194
Ozaukee	$861	$348	$173	$1,382	$100	$8	$0	$0	$114	$1,604
Pepin	$30	$10	$0	$39	$35	$0	$0	$0	$0	$74
Pierce	$266	$106	$0	$372	$93	$18	$3	$0	$9	$495
Polk	$135	$159	$0	$294	$110	$19	$11	$0	$15	$449
Portage	$0	$16	$0	$16	$931	$25	$0	$0	$98	$1,070
	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Price	$169	$0	$9	$178	$76	$15	$0	$0	$9	$279
Racine	$1,984	$141	$11	$2,136	$501	$177	$3	$56	$123	$2,997
Richland	$152	$24	$0	$176	$51	$0	$2	$2	$0	$232
Rock	$2,998	$82	$0	$3,080	$423	$52	$14	$11	$212	$3,792
Rusk	$63	$4	$5	$72	$83	$0	$0	$0	$28	$184
Sauk	$430	$215	$0	$645	$132	$14	$1	$0	$47	$840
Sawyer	$83	$7	$8	$98	$34	$4	$16	$0	$27	$180
Shawano	$74	$47	$0	$121	$296	$12	$0	$0	$23	$452
Sheboygan	$2,499	$165	$43	$2,707	$504	$138	$3	$16	$479	$3,848
St. Croix	$390	$141	$0	$531	$196	$86	$17	$0	$91	$921
	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Taylor	$70	$34	$5	$109	$35	$8	$0	$0	$30	$182
Trempealeau	$177	$46	$0	$223	$25	$0	$0	$0	$14	$262
Vernon	$148	$34	$0	$181	$38	$0	$7	$0	$28	$255
Vilas	$15	$36	$154	$206	$38	$10	$18	$0	$80	$351
Walworth	$458	$259	$0	$716	$306	$27	$0	$5	$167	$1,222
Washburn	$73	$0	$0	$73	$27	$2	$3	$0	$6	$112
Washington	$814	$330	$0	$1,144	$303	$47	$16	$14	$113	$1,637
Waukesha	$3,927	$1,777	$335	$6,039	$1,180	$252	$34	$33	$319	$7,857
Waupaca	$605	$45	$0	$650	$244	$1	$0	$37	$10	$942
Waushara	$22	$51	$18	$91	$120	$0	$18	$3	$38	$270
Winnebago	$2,533	$28	$0	$2,561	$953	$44	$38	$132	$205	$3,933
Wood	$1,362	$6	$0	$1,368	$292	$180	$7	$0	$164	$2,011

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******** LIBRARY EXPENDITURES (in $1,000s) ********						****** CAPITAL EXPENDITURES (in $1,000s) ******				
Salaries & wages	*Benefits*	*Library material*	*Contract services*	*Other expend*	*Total op expend*	*Federal income*	*State income*	*Local income*	*Other income*	*Total expend*
$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
$13,980	$4,821	$3,139	$108	$3,442	$25,490	$0	$0	$2,793	$3	$2,796
$211	$64	$85	$30	$94	$484	$0	$0	$34	$27	$61
$121	$23	$51	$0	$43	$238	$113	$1	$353	$50	$517
$372	$143	$83	$5	$89	$692	$0	$0	$0	$6	$6
$1,627	$571	$403	$139	$392	$3,132	$0	$0	$2	$173	$176
$727	$221	$247	$43	$272	$1,510	$0	$6	$17	$23	$46
$36	$5	$19	$0	$10	$70	$0	$0	$0	$1	$1
$242	$69	$115	$0	$60	$486	$0	$0	$4	$3	$7
$203	$51	$104	$0	$74	$432	$0	$0	$3	$21	$24
$574	$191	$98	$8	$159	$1,029	$0	$0	$48	$111	$159
$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
$142	$46	$46	$0	$41	$275	$0	$0	$0	$12	$12
$1,575	$512	$409	$17	$404	$2,917	$0	$0	$3	$1	$3
$112	$34	$22	$34	$29	$230	$0	$0	$0	$0	$0
$1,976	$598	$571	$13	$490	$3,647	$0	$0	$169	$1	$170
$91	$34	$18	$0	$21	$164	$0	$0	$0	$1	$1
$428	$114	$152	$27	$105	$826	$0	$0	$59	$16	$76
$81	$9	$38	$21	$25	$174	$0	$0	$0	$0	$0
$198	$67	$74	$0	$102	$441	$0	$9	$6	$3	$18
$1,856	$568	$451	$75	$386	$3,336	$0	$0	$40	$0	$40
$425	$118	$164	$0	$121	$828	$72	$1	$3	$183	$258
$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
$78	$13	$29	$2	$32	$154	$0	$0	$0	$1	$1
$111	$26	$57	$21	$35	$250	$0	$0	$3	$11	$14
$104	$26	$44	$23	$37	$234	$0	$0	$18	$1	$18
$131	$15	$75	$18	$84	$323	$0	$0	$0	$19	$19
$561	$130	$186	$57	$179	$1,113	$0	$0	$0	$33	$33
$41	$7	$25	$22	$11	$106	$0	$0	$10	$0	$10
$749	$230	$254	$3	$309	$1,545	$0	$3	$73	$57	$133
$3,732	$1,115	$1,284	$5	$1,443	$7,579	$0	$30	$32	$5	$67
$427	$115	$185	$68	$111	$906	$70	$0	$1,646	$309	$2,024
$79	$21	$49	$73	$28	$250	$0	$0	$6	$14	$20
$1,981	$726	$503	$263	$404	$3,877	$0	$0	$4,539	$6	$4,545
$942	$308	$276	$10	$366	$1,902	$1	$4	$95	$42	$143

Appendix D: Library Resource Inventory Form

A sample library resource inventory form is provided on the following pages. County planners are not required to use this particular form but may adapt the form to meet specific local information needs.

It is offered here merely as an example of the type of form that can be used to standardize reporting about libraries in the county so that members of the planning committee and other local officials can receive the same information about the status of the libraries in the county and the cumulative resources that are available within the county.

LIBRARY RESOURCE INVENTORY FORM

Library: _____

Address/phone: _____

Librarian: _____

Service population: _____ Municipality _____ Service area

COLLECTIONS

Books

Adult

Fiction _____

Nonfiction _____

Reference _____

Other (list)

_____ _____

_____ _____

_____ _____

YA _____

Children's

Picture books _____

Fiction _____

Nonfiction _____

Other (list)

_____ _____

_____ _____

TOTAL volumes held _____

Periodicals received _____

Titles retained in back iss _____

Average # yrs retained _____

Audio recordings held _____

Films held _____

Videos held _____

Other formats held (describe)

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

Describe special or unique collections, or special subject strengths (such as local history, etc.):

SERVICES

Registered borrowers
- Residents _____
- Nonresidents _____
- TOTAL _____
  - Nonresident pct of total _____%

Circulation
- Adult _____
- Children _____
- TOTAL _____
- Circ to nonresidents _____

Interlibrary loans
- Items loaned _____
- Items received _____

Program attendance
- Adult _____
- Children _____
- TOTAL _____

Reference transactions _____
Attendance in library _____
In-house use of materials _____

FINANCES

Operating income	Amount	% of total
Local appropriations	_____	_____%
County appropriations	_____	_____%
State aid	_____	_____%
Federal aid	_____	_____%
Contract income	_____	_____%
All other income	_____	_____%
TOTAL	_____	100%

Operating expenditures		
Salaries and wages	_____	_____%
Employee benefits	_____	_____%
Collection expenditures		
Print material	_____	
Serial subscriptions	_____	
Microforms	_____	
Machine readable matls	_____	
Audiovisual materials	_____	
All other materials	_____	
TOTAL collection	_____	_____%
Contracts for services	_____	_____%
Other operating expenditures	_____	_____%
TOTAL	_____	100%

Capital expenditures (total) _____
Debt retirement _____

STAFFING

Librarians (in full-time equivalents - FTEs)

ALA MLS	_____	All other paid staff	_____
Other Master's degree	_____	TOTAL STAFF	_____
Others librarians	_____	FTE per 1,000 population	_____

FACILITIES

Building data

Gross area of main / central library _____sf

Does this structure comply with accessibility regulations? _____ Yes _____ No

Does the library provide off-street parking: _____ Yes _____ No

If yes, how many spaces are provided? _____

Does the library maintain branches?

If yes, list here:	Area	Date
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____
_____	_____sf	_____

(Note: separate resource inventory forms may be filled out for each individual branch operated by the library.)

Construction history

	Date	Area
Date of construction of main / central library	_____	_____sf
Date of construction of addition(s)	_____	_____sf
	_____	_____sf
_____ no additions	_____	_____sf
	_____	_____sf

Was the building originally constructed for use as a library? _____ Yes _____ No

Space needs

Is an expanded building needed in the next ten years? _____ Yes _____ No

If yes, is the project most likely to involve (check one):

_____ new construction _____ conversion of an existing structure

_____ addition _____ unknown

What will the gross area of the finished structure be? _____sf

AUTOMATION

Microcomputers

List the type and number of microcomputers available for public access use:

CD-ROM products available for public use (i.e., indexes, encyclopedias):

List the type and number of microcomputers available for staff use:

Type of activities and work routines supported by the microcomputers used by staff:

Library automation

Does the library maintain an automated circulation system? _____ Yes _____ No
If yes, identify the vendor: _____
Does the library maintain an on-line catalog? _____ Yes _____ No
If yes, identify the vendor: _____
Is the system: _____ shared with other neighboring libraries, or _____ a standalone
Brief description of the system:

WISCAT participation

Does the library participate in WISCAT? _____ Yes _____ No
If yes, when did the library first contribute records to WISCAT (year)? _____

ROLE SELECTION

If the library has completed a role selection exercise, indicate the library's **primary role(s)** with a "1" and the **secondary role(s)** with a "2".

_____ Community Activities Center
_____ Community Information Center
_____ Formal Education Support Center
_____ Independent Learning Center
_____ Popular Materials Center
_____ Preschoolers' Door to Learning
_____ Reference Library
_____ Research Library